OVERSEAS VISITORS
TO
BRITISH COLUMBIA

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OVERSEAS VISITORS TO BRITISH COLUMBIA

EXECUTIVE SUMMARY

INTRODUCTION

Overseas visitors travelling within British Columbia represent 3.5% of the total tourist volume. More significantly, they contribute 7% of the $5.2 billion revenue generated by tourists in the province. Five markets dominate the overseas visitation to British Columbia: Japan (which alone contributes nearly 1/3 of the 7%), the United Kingdom, Germany, Hong Kong, and Australia. These countries account for 63% of the visitor nights and 68% of the annual revenue generated by overseas visitors.

For most other tourist markets, the amount of revenue generated is proportional to the volume of visitors. For example, Albertans contribute 7% of the total volume and generate 8% of the province's tourism revenue. Californians, the largest U.S. market, generate 3% of the volume and 4% of the revenue. Ontario residents, along with overseas visitors, are an exception to the rule; although contributing only 3.5% of the visits, Ontario residents are responsible for 10% of the revenue, the most of any one non-resident market. From these figures, it is clear that overseas visitors are, on an individual basis, important to the province's tourism revenue.

JAPAN

In terms of volume and the amount of revenue generated, the largest of the overseas markets is Japan. The 207,000 Japanese who visited in 1990 represented one-quarter of the volume and revenue generated by overseas visitors to the province, a total of $104 million dollars.

Japan is not only the largest of the overseas markets to B.C., it is also the fastest growing. In the six years between 1985 and 1990, the number of Japanese visiting B.C. more than doubled. The increase in Japanese visitors to B.C. from 1989 to 1990 was nearly 17%.

Tourism Canada has forecast that over the next five years the number of Japanese tourists visiting Canada will continue to grow at between 5 and 8 per cent, as it has over the past two years.

Typically, Japanese come to Canada on a 5 day pleasure trip, usually during the summer months, and often as part of a package tour that may also include destinations in the U.S.A. A significant number (nearly 25%) of Japanese also travel here on business purposes. Each visitor spends over $100 per day, the highest rate of expenditure of any tourist group.

"Single office ladies" are the single most important market segment (1/5 of the total) of Japanese tourists who come to Canada. Honeymooners, retired people, and students are other important market segments. On the product side, the ski market has shown considerable growth in the past few years.

UNITED KINGDOM

In 1990, 134,000 British tourists travelled to B.C. This represents 16.5% of the number of overseas visitors to the province. During their stays, these visitors contributed $56 million in revenue.

The number of British visitors to B.C. has grown slowly but steadily; between 1989 and 1990 the increase in visitation was nearly 3%. Tourism Canada has predicted that over the next five years, the number of U.K. visitors to Canada will drop by 1.5% in 1991, and then increase by 1 to 1.5 per cent over the four years following.

Typically, British visitors come to B.C. to visit friends and relatives between June 1 and September 30. They stay nearly 10 days, each visitor spending $43 per day.

GERMANY

The number of Germans visiting British Columbia in 1990 was 77,000. These visitors generated $40 million in revenue.

The number of Germans visiting B.C. dropped by 2% from 1989 to 1990; the number visiting Canada decreased by nearly 6% the same year. Accordingly, B.C.'s share of the shrinking German market has increased. Tourism Canada has projected that the number of Germans visiting Canada will continue to decline through 1992, followed by slow growth between 1993 and 1995. British Columbia is well positioned to attract an increasing share of the Germans who visit Canada.

A typical German tourist comes to visit friends and relatives or on a pleasure holiday and stays 10.5 days in B.C., spending $50 per person per day. The average total trip expenditure of German tourists is exceeded only by visitors from Ontario.

HONG KONG

During 1990, over 73,000 residents of Hong Kong visited B.C., contributing $36 million in revenue to the provincial economy. This was an increase of 1.5% over 1989. British Columbia captures over one-half of the total number of Hong Kong residents who visit Canada.

Hong Kong residents stay an average of 7.5 days in B.C., spending $64 per person per day.

AUSTRALIA

The number of Australians who visited B.C. dropped 1.6% in 1990 to 58,535. The contribution Australian tourists to provincial revenue was $22 million in 1990. Nearly one-half of all Australians who travel to Canada visit B.C.

On average, Australians who visit B.C. stay just over 7 days, spending $52 per person per day. Australians travel to Canada on pleasure holidays (37%), or to visit friends and family (36%).

OVERSEAS VISITORS TO BRITISH COLUMBIA

INTRODUCTION

Overseas visitors to British Columbia represent 3.5% of the total visits made in the province. More significantly, they contribute 7% of the revenue generated by tourists in the province.

Five markets dominate the overseas visitation to British Columbia: Japan, the United Kingdom, Germany, Hong Kong, and Australia. These countries account for 63% of the visitor nights and 68% of the annual revenue generated by overseas visitors.

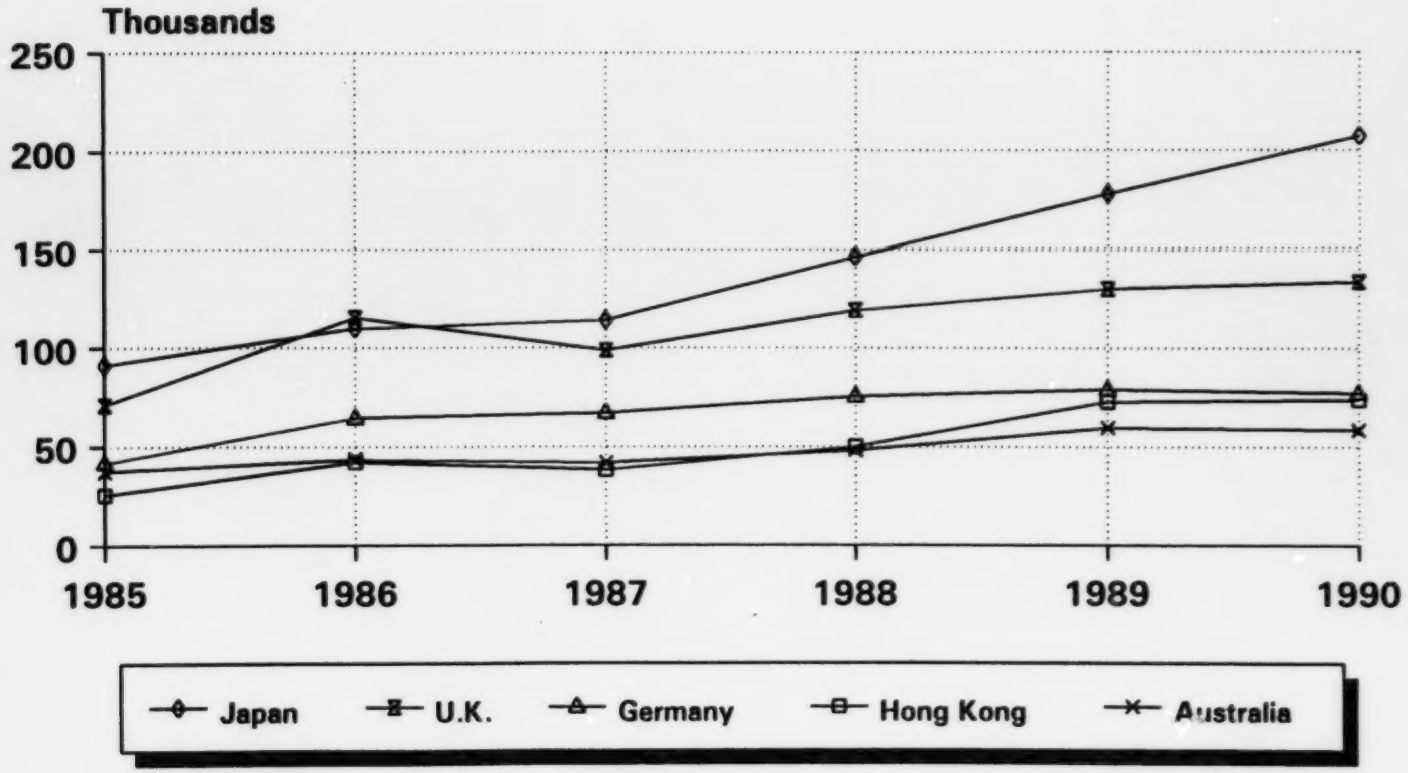
Total overseas visitation to British Columbia during 1990 increased by 5.3% over the previous year, while visitation to Canada by overseas residents was down slightly (a decrease of 0.6%) during the same period.

In terms of number of visitors, the largest of the overseas markets is Japan. The Japanese represent roughly 25% of the overseas visitors, and contribute 2% of the province's total tourism revenue. They have the highest daily expenditures of all tourists, each visitor spending $103 per day. Their stays in British Columbia are quite short, averaging 5 days in length. Fewer British tourists than Japanese come to British Columbia, but they stay longer, thereby generating more visitor nights.

To contrast these figures with other tourist markets, Albertans contribute 7% of the total visits made in British Columbia, and generate 8% of the province's tourism revenue. Ontario residents, although contributing only 3.5% of the visits, are responsible for 10% of the revenue, the most of any one market other than British Columbia residents. Californians, the largest U.S. market, generate 3% of the visits and 4% of the revenue.

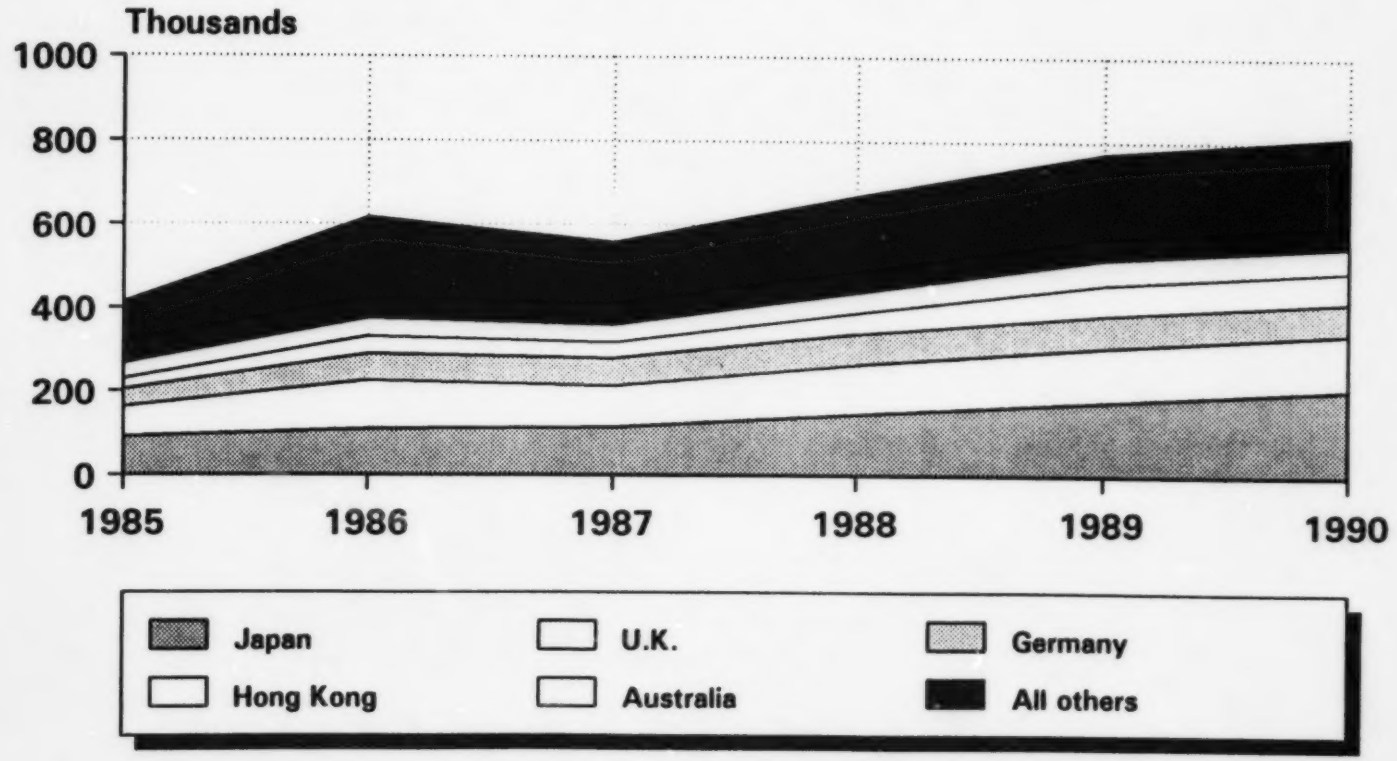
British Columbia residents are by far the largest generators of tourism visits and revenue. They contribute 67% of the visits, and 52% of the revenue that is generated in the province through tourism activities.

Figure 1
Overseas (Top Five) Visitors To B.C. 1985-1990



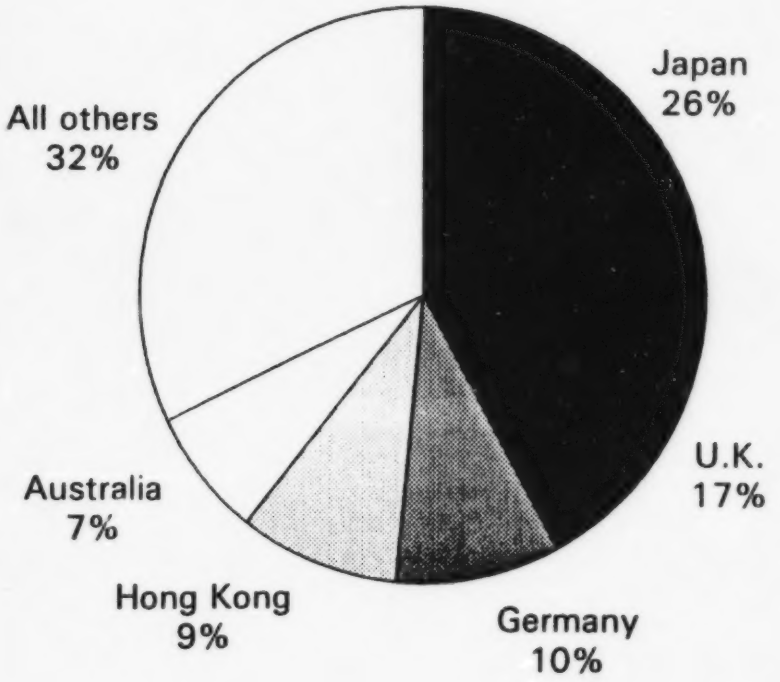
source: Statistics Canada, Tourism B.C.

Figure 2
Overseas Visitors to B.C.
Total Visitation 1985-1990



source: Statistics Canada, Tourism B.C.

Figure 3
Overseas Visitors to B.C.
Total 1990 Visitation: 812,645

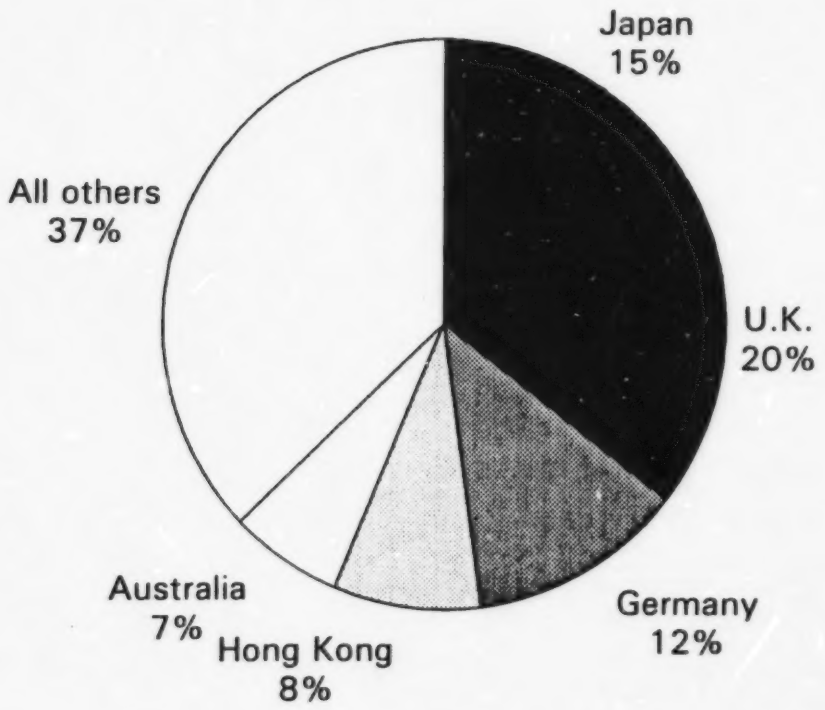


source: Statistics Canada, Tourism B.C.

Figure 4

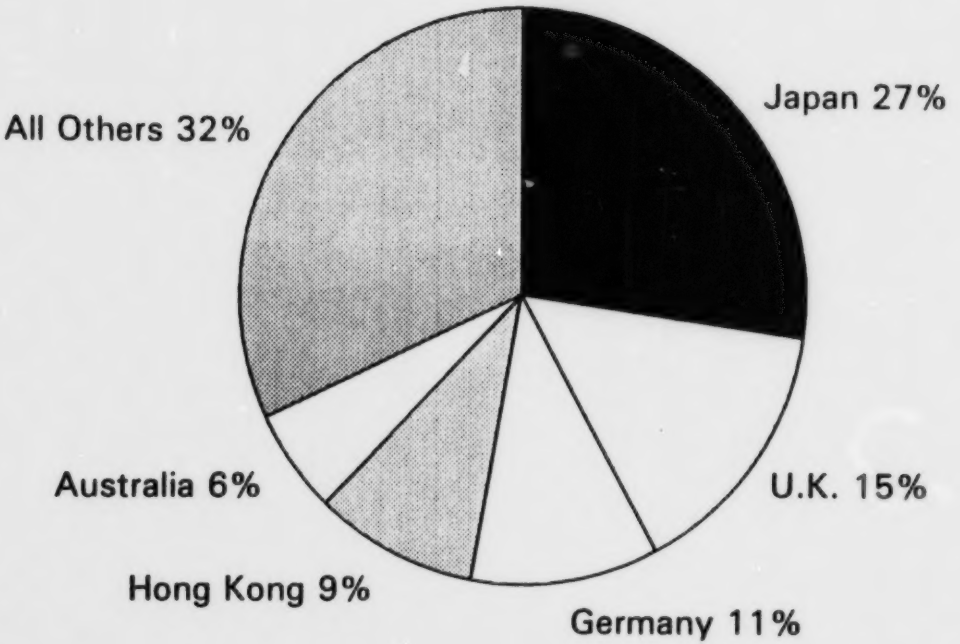
Overseas Visitors: Visitor Nights

Total 1990 Visitor Nights: 6,541,589



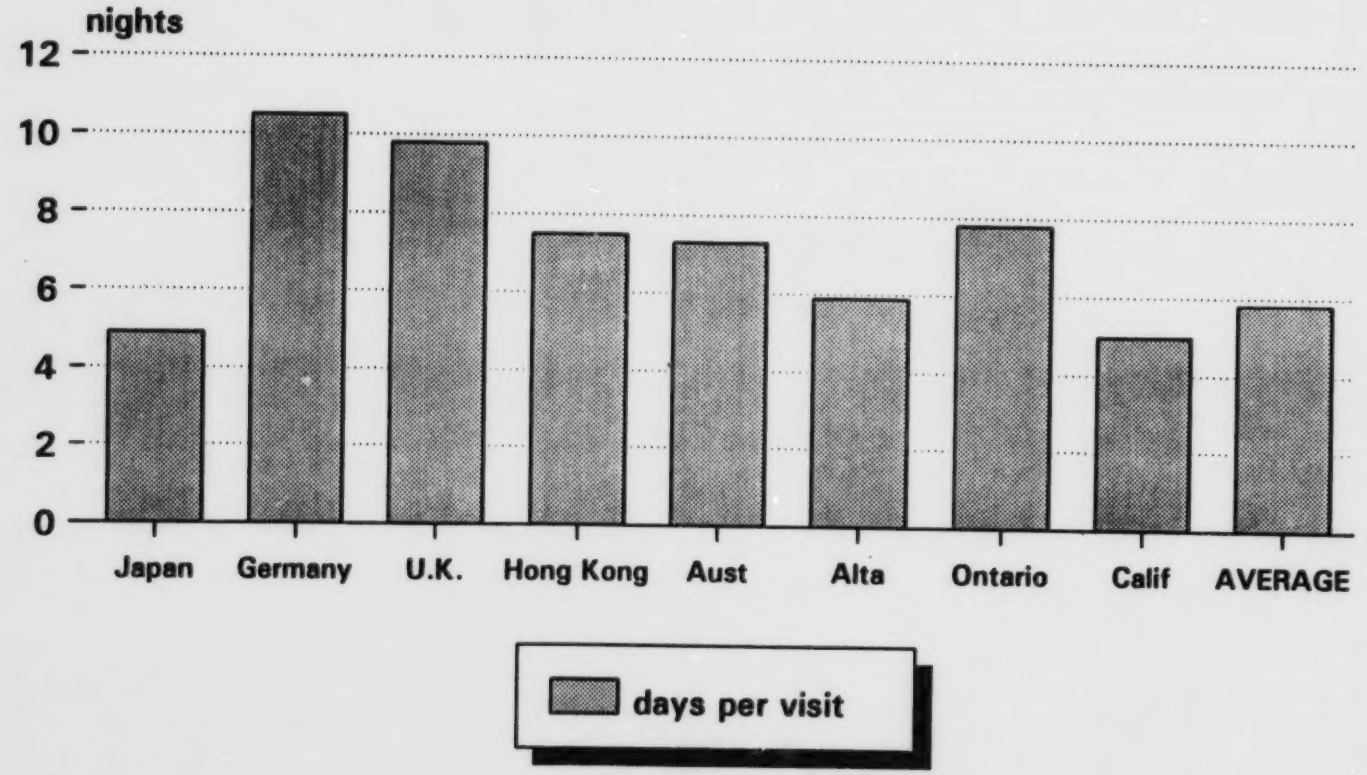
source: Statistics Canada, Tourism B.C.

Figure 5
Revenue Generated By Overseas Visitors
Total 1990 Revenue: $379,500,000



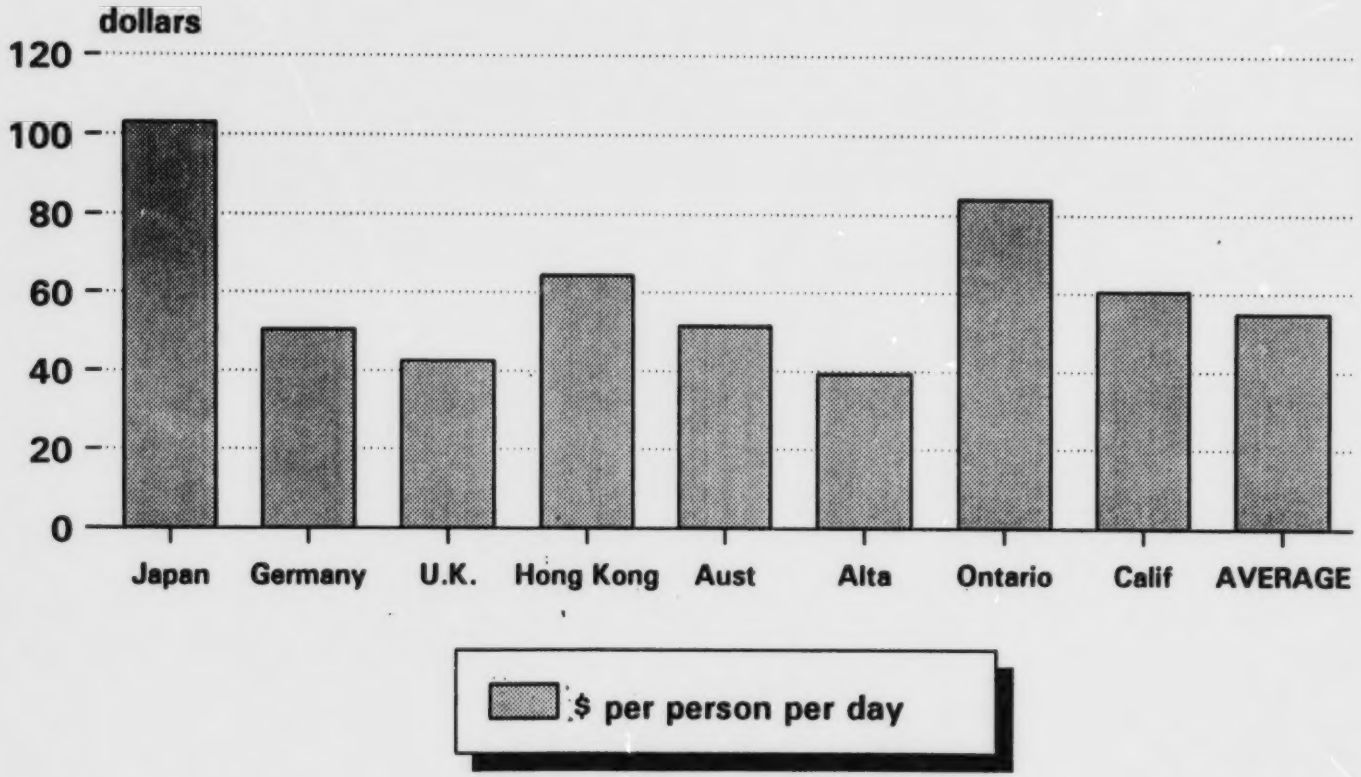
source: Tourism B.C.

Figure 6
Length of Stay
(1989 data)



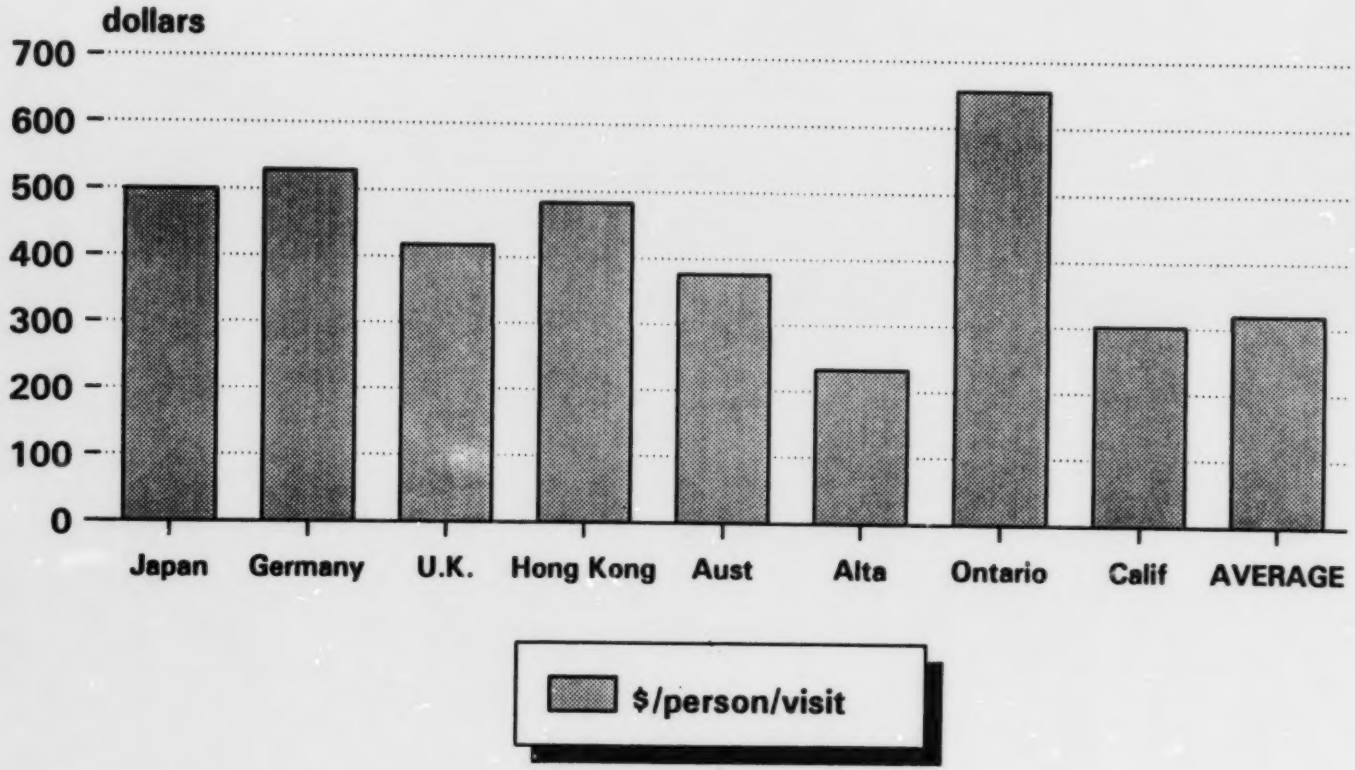
sources: Visitor 89 (others)
Statistics Canada, Visitor 89 (overseas)

Figure 7
Visitor Per Diems
(1989 data)



sources: Visitor 89 (others)
Statistics Canada, Visitor 89 (overseas)

Figure 8
Total Trip Expenditure
(1989 data)



sources: Visitor 89 (others)
Statistics Canada, Visitor 89 (overseas)

JAPANESE VISITORS TO BRITISH COLUMBIA

SYNOPSIS [*]

Number of visitors:	207,244
Increase over 1989:	16.6%
B.C.'s share of Japanese visitors to Canada:	43%
Percentage of overseas visitors to B.C.:	26%
Percentage of total tourist volume in B.C.:	0.9%
Total revenue generated in B.C.:	$104 million
Percentage of total tourist revenue in B.C.:	2.0%

Trip Characteristics

Length of stay in B.C.:		5 days
Length of trip (1989; Canada):		13 days
Spending:		$103 per person per day
Party size (1989; Canada):		1.6 persons
Purpose (1989; Canada):	Pleasure holiday:	55%
	Business:	24%
	Visit friends and relatives:	12%
Type of trip (1989; Canada):		65% "touring trip"
Season of visit:	June to August:	42%
	August:	17%
Package tours (date unknown):		70% participation
Accommodation (1989; Canada):		45% luxury hotels

Visitor Characteristics (1989; Canada)

Age:	33% between 20 and 29 years of age (20% women, 13% men)
	15% over 60 years of age
Education:	91% some post-secondary education
	51% university degree
Income:	52% over $43,000
	26% over $72,000

[*] Note: All statistics are from 1990 unless otherwise indicated.

JAPAN

A. MARKET SIZE

1. Size of the Japanese Travel Market

In 1989, a total of 9.7 million Japanese travelled overseas. (It is believed that this figure surpassed the 10 million mark in 1990.) Canada was the destination of choice for 5% (just under 475,000) of those trips.

Other destinations in Asia (what might be considered the short-haul destinations) received 48% of the Japanese tourist travel. The United States was the single most popular destination, split between Hawaii (getting 13% of Japanese travellers) and the mainland (which received 21% of the tourists). Europe was the destination for 10% of the trips, more than half of which visited either France or Britain. Australia was the destination for 3% of the trips made by Japanese tourists in 1989[1].

Tourism Canada has forecast that over the next five years, the Japanese market to Canada will continue to grow at between 5 and 8 per cent, as it has for the last two years[2]. It must be pointed out that during 1989 and 1990, Japanese visitation to British Columbia grew at a substantially greater rate than visitation to the rest of Canada. It appears that B.C. is better positioned to withstand a downturn in the growth rates of Japanese visitation to Canada.

2. Number of Visitors to British Columbia and Canada[3]

The number of Japanese tourists visiting British Columbia has increased dramatically in the past few years (as shown in Figures 1 and 2), increasing 127% in the six year period between 1985 and 1990. This rise in visitation is linked to the rapid growth in Japanese outbound travel to all destinations.

In 1990 British Columbia saw a 16.6% increase in the number of Japanese visitors to B.C., while Japanese visitation to Canada as a whole rose by only 2.5%. While B.C. saw a significant increase in the number of Japanese visits in 1990, Ontario (the province through which most Japanese enter Canada) experienced a 6% drop in Japanese entries.

The Japanese now constitute 26% of the overseas visitors to B.C. (See Figure 3.)

---

[1]Japan Airlines, *Overseas Travel Market To and From Japan '90*, JAL Marketing Report, Tokyo, August, 1990, p. 7.

[2]Tourism Canada, *International Forecasts In Brief*, presented at Federal-Provincial-Territorial Conference of Ministers of Tourism, July, 1991. An accompanying graph is included in Appendix B.

[3]Unless otherwise noted, the source of the data in this section is Statistics Canada, *Touriscope: International Travel. National and Provincial Counts*, Catalogue 66-001.

Significantly, B.C.'s share of the Japanese tourist market in Canada has increased in the period 1988 to 1990 from 36% to 43% of the visitors. This increase in market share has been primarily at the expense of Ontario.

During the first four months of 1991, the number of Japanese tourists visiting B.C. increased by 0.3%, compared to a drop of 2.8% in the visitation of Japanese to Canada during the same period. It must be noted that the Gulf War may have influenced travel patterns during this period.

The table below tabulates the number of Japanese entering British Columbia and Canada in 1989 and 1990.

Direct Entries of Japanese

British Columbia:		
	1989:	162,283
	1990:	189,255
	% increase:	16.6%
Canada:		
	1989:	462,699
	1990:	474,132
	% increase:	2.5%

Many Japanese visitors who visit B.C. enter Canada through another province and then travel to B.C. These indirect entries are difficult to measure, but are felt to contribute significantly to the total number of visitors. Visitation by Japanese tourists to B.C. is given below.

Total Visitation of Japanese[4]

British Columbia:		
	1989:	177,708
	1990:	207,244
	% increase:	16.6%

It has been estimated that 70% of all Japan-Canada traffic is routed through the U.S.[5] This is reflected in the following 1989 statistics: 462,669 Japanese entered Canada, but only 136,818 left Japan bound for a Canadian destination[6]. The key

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[4]Tourism B.C. estimate.

[5]Tourism Canada, *Tourism Intelligence Bulletin*, March, 1991, p. 3, ref. 910312.

[6]Japan Travel, *Blue Book '90/91*, p. 72; Statistics Canada, *Touriscope: International Travel. National and Provincial Counts*, Catalogue 66-001.

entry points have been identified as being Seattle, San Francisco, Chicago, Detroit and New York[7]. This indirect entry is directly related to a shortage of available flights from Japan to Canada.

3. **Visitor Nights**

It is been estimated that the Japanese spent over 1.9 million visitor nights in Canada in 1989; roughly 45% (about 860,000) of those were spent in B.C. In 1990, Japanese tourists spent just over one million visitor nights in British Columbia[8]. This represents 15% of the total visitor nights spent in B.C. by overseas visitors (as shown in Figure 4).

Although the Japanese represent the largest overseas tourist market in terms of the number of visitors and the amount of revenue generated, the British visitors spend more visitor nights in B.C. (In 1990, British visitors spent over 1.3 million visitor nights in B.C.[9]) This is due to the fact that the average British visitor stays almost twice as long in B.C. than does a Japanese tourist. (See Figures 4 and 6.)

4. **B.C.'s Share of the Canadian Market**

Canada is the destination for approximately 5% of the ten million Japanese international travellers. If B.C. gets roughly 40% of the visitors to Canada (discussed in more detail below), 2% of the Japanese who travel overseas come to B.C.[10]

Forty per cent of all Japanese tourists who come to Canada enter through British Columbia[11]. An additional four per cent visit B.C. after having entered the country via another province[12].

As mentioned earlier, B.C.'s share of the Japanese tourist market in Canada increased 7% in the period 1988 to 1990. Ontario, the province of entry for most Japanese tourists, has seen its market share drop by the same amount over the same period[13].

A recent study found that western Canada (B.C., Alberta, Yukon, and N.W.T.) was given as the area of longest stay by 59% of Japanese visitors. The following table details these visitation patterns:

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[7]Tourism Canada, *Market Assessment: Japanese Pleasure Travellers*, August, 1988, p.3.
[8]Tourism B.C. estimate.
[9]Tourism B.C. estimate.
[10]Marketfacts, *Pleasure Travel Markets To North America: Highlights Report*, 1989, p. 39.
[11]Statistics Canada, *Touriscope: International Travel. National and Provincial Counts*, Catalogue 66-001.
[12]Tourism B.C. estimate.
[13]Statistics Canada, *Touriscope: International Travel. National and Provincial Counts*. Catalogue 66-001.

REGION OF LONGEST STAY[14]

Province	% respondents
BC, Alta, NWT, Yukon	59%
Sask., Manitoba	0%
Ontario	30%
Quebec	5%
Atlantic	5%

The table below shows all the regions of Canada visited by a sample of Japanese travellers in the three years prior to the survey; multiple choices and multiple trips were permitted.

The results of the survey emphasize the fact that many Japanese visitors to Canada travel in a multiple destination "seven day dash" package tour. That 75% of the visitors had travelled to Ontario, 71% to B.C., and 60% to Alberta is astounding. This indicates that at least 46% of the visitors travelled to both Ontario and B.C. (71% - [100% - 75%] = 46%), and that at least 31% travelled to both Alberta and British Columbia. Unfortunately, it is impossible to determine how many of the tourists visited the two regions on two different trips.

REGIONS VISITED[15]

Province	% respondents
BC	(71%)
Vancouver	65%
Victoria	39%
Alberta	(60%)
Banff	51%
Calgary	28%
Jasper	15%
Ontario	(75%)
Niagara Falls	57%
Toronto	55%
Ottawa	14%
Quebec	(26%)
Montreal	20%

[14]Tourism Canada, *Travel Price / Value Perception Study*, Volume III (Exit - Mailback Survey Report) (draft), January, 1991. Exhibit 3.3, between pp. 13-14.

[15]Market Facts, *Pleasure Travel Markets To North America: United Kingdom, France, West Germany and Japan. Highlights Report*, Tourism Canada, October, 1989, p. 42.

B. REVENUE GENERATED

It is estimated that in 1990, the Japanese spent $104 million in British Columbia.[16] This is 2.0% of the $5.2 billion generated by tourist activities in the province, and 27.3% of the revenue generated by overseas tourists visiting B.C. The relative importance of the various overseas tourist markets is shown in Figure 5.

C. TRIP CHARACTERISTICS

1. General Statistics

The average length of stay of a Japanese visitor to B.C. is 5 nights (see Figure 6). During that time, the visitor will spend just over $500, at a rate of about $103 per day[17]. This is by far the highest daily expenditure rate of any group of visitors to the province, as shown in Figure 7. It is also one of the highest total trip expenditures, surpassed only by German and Ontario visitors (see Figure 8).

One study of Japanese visitors to Canada found that the average total trip length was 13 days, and cost a total of $2912 (note that these are *not* measures of length of stay and expenditures in Canada). The average group size was found to be 1.56, reflecting the high proportion of single women visiting Canada (discussed later)[18].

2. Spending

Tourism Canada's *Travel Price / Value Perception Study* (1990) revealed that on average, the total per party trip cost to Canada was just under $3000[19]. This figure includes air fare, and is therefore not an accurate means of determining daily expenditures.

Studies conducted in other tourist destinations confirm the notion that the Japanese tourist has a propensity to spend large sums of money. In 1988, the average Japanese visitor to Hawaii spent $586 per day, up from $367 (a 60% increase) the previous year. By comparison, the typical visitor to Hawaii from elsewhere in the world (primarily the mainland U.S. and Canada) spent $119 per day, up from $102 (a 17% increase) in 1987[20]. The growth in Japanese visitor daily expenditures from 1983 to 1988 is given below.

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[16] Tourism B.C. estimate.

[17] Tourism B.C. estimate.

[18] Tourism Canada, *Travel Price / Value Perception Study*, Volume III (Exit - Mailback Survey Report) (draft), January, 1991.

[19] Tourism Canada, *Travel Price / Value Perception Study*, Volume III (Exit - Mailback Survey Report) (draft), January, 1991.

[20] Hawaiian Visitors Bureau, *Annual Report 1987-1988*, p.17; "Plenty of Yen to Spend", *Hawaiian Beat*, Vol. 3, No. 5, May, 1989, p. 3.

Changes in Expenditures:
Japanese Visitors to Hawaii[21]

Year	$/day	% increase
1983	$227.32	
1984	$234.44	3%
1985	$251.42	7%
1986	$257.40	2%
1987	$366.63	42%
1988	$586.00	60%

Another study conducted in Hawaii found that the typical Japanese tourist spent $250 per day on shopping alone, primarily on gifts and souvenirs for friends and relatives[22].

Research conducted in Australia has shown that Japanese visitors spend more per day than any other visitor group. It was found that the Japanese spend more than any other nationality on domestic air fares (made necessary by the "seven day dash" type of visit) and shopping. It was also noted that Japanese tourist expenditures on shopping in Australia were about average or below average what they spend elsewhere in the world[23].

The Australian study also included an itemization of the expenditures made in Australia. The bulk of the trip cost was food, drink & accommodation (35.8%), shopping (33.9%), and domestic air fares (18.3%)[24]. These statistics are somewhat skewed by the fact that the trip expenditures made outside Australia are not included; hence, international air fares only account for 0.6% of the total, and organized tours amount to only 2.2% of the expenditures.

It has been noted elsewhere that the international air fare portion amounts to 60% of the total trip cost[25]. Given the nature of Japanese travel, it seems certain that the proportion of expenditure on package trips would also be significantly higher than the amount given in the Australian study.

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[21] Hawaiian Visitors Bureau, *Annual Report 1987-1988*, p.17; "Plenty of Yen to Spend", *Hawaiian Beat*, Vol. 3, No. 5, May 1989, p. 3.

[22] Katahara, A., "The Inside Story", *Hawaiian Beat*, Vol. 3, No. 11, November, 1989, p. 8.

[23] Tourism Australia, *Japan Market Brief* (4th ed.), 1988, pp. 69-70.

[24] Tourism Australia, *Japan Market Brief* (4th ed.), 1988, p. 70 (Table 6.22).

[25] Yoshioka, T., "Megatrends in Japan's Leisure Travel", pp. 15-25 in A. Lysons & D. McSwan, *The Entrepreneur & Tourism*, Seminar Series No. 3, Centre for Studies in Travel & Tourism, James Cook University of Northern Queensland, Townsville, Australia, 1989.

From this information, it is apparent that Japanese tourists spend large sums of money, as their reputations would indicate. Much of their spending is on gift items and on "name brand" items such as designer clothing. Quality shopping opportunities are vital to the Japanese tourist experience.

3. Trip Purpose

Over half (55%) of the Japanese who come to Canada do so as part of a pleasure trip. Few Japanese come to Canada to visit friends and relatives; statistics indicate that approximately 12% of the tourists are here for that purpose. Also, a very high portion (nearly one in four) travel to Canada for business purposes[26]. Figure 9 shows the trip purposes of Japanese travellers to Canada.

4. Seasonality of Visits

Visitation by the Japanese peaks in the summer. Over 40% of the Japanese who come to B.C. do so between June 1 and August 30, 17% in August alone. This may be changing somewhat, however. In 1990, the months of January and February saw significant increases in the proportion of Japanese visitors travelling to British Columbia[27]. It is speculated that this phenomenon is related to the increased numbers of visitors to the ski hills of B.C.

Figure 10 shows the monthly visitation of Japanese tourists, over the years 1989 and 1990, and for the first four months of 1991.

5. Package Tours

Recent figures indicate that 70% of Japanese tourists visiting Canada rely on an all-inclusive package tour, although independent (non-package) travel has shown a slight increase in recent years[28].

A recent survey of visitors to Hawaii has also identified a trend toward reduced levels of participation in package tours. Unfortunately, no explanation is offered as to why this trend might be occurring[29].

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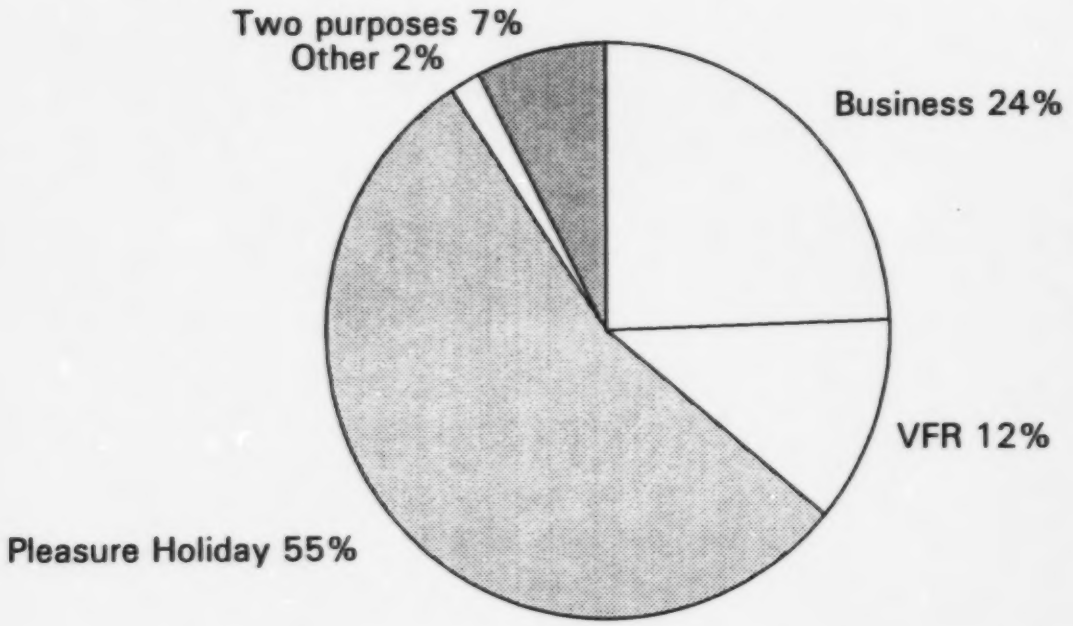
[26] Statistics Canada, *Touriscope: International Travel. Travel Between Canada and Other Countries*, Catalogue 66-201.

[27] Statistics Canada, *Touriscope: International Travel. National and Provincial Counts*, Catalogue 66-001.

[28] Tourism Canada, *Market Assessment: Japanese Pleasure Travellers*, August, 1988, p. 3.

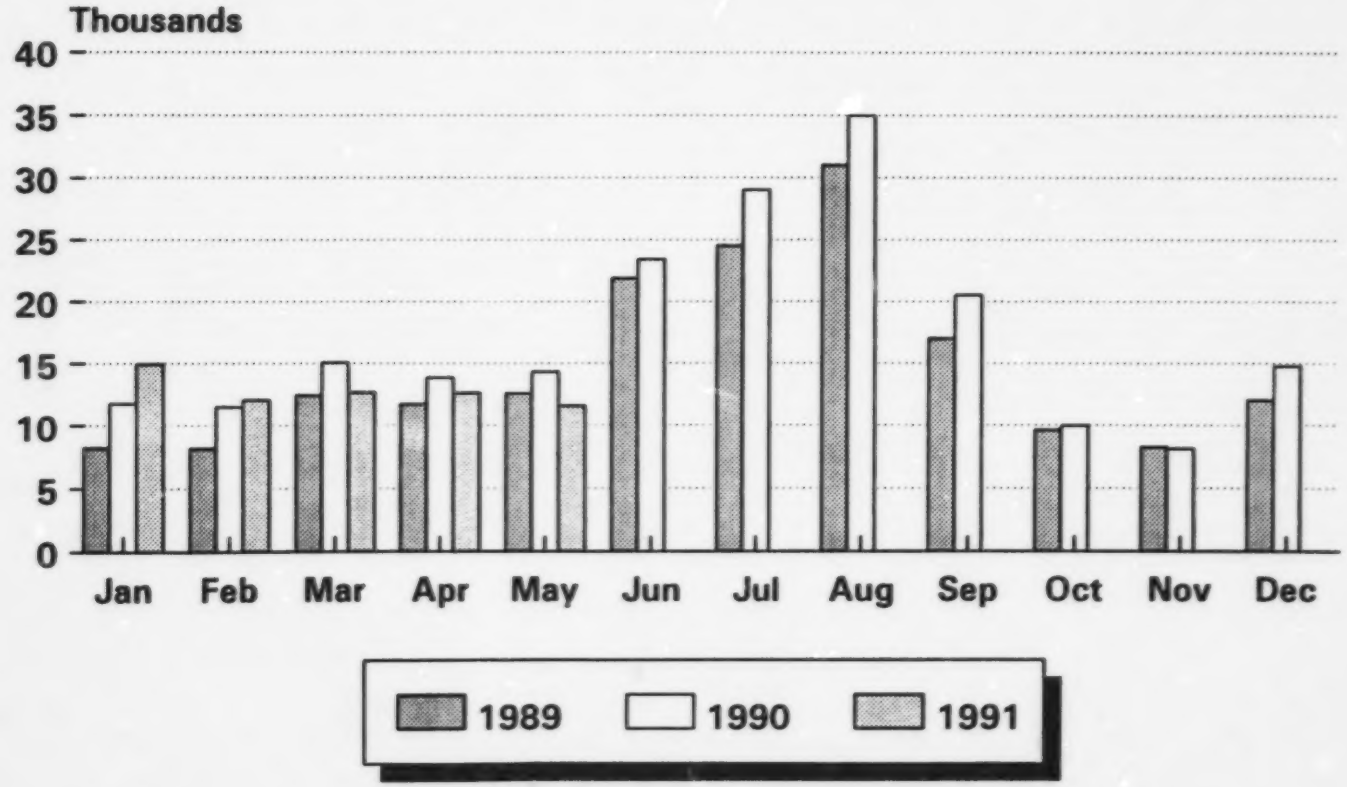
[29] Collins, J., "Changing Trends in Travel", *Hawaiian Beat*, Vol. 3, No. 11, November, 1989, p. 9.

Figure 9
Trip Purpose
Japanese Visitors To Canada



source: Statistics Canada, 1989

Figure 10
Japanese Visitors to B.C.
Monthly Visitation 1989-91



Source: Statistics Canada, Tourism B.C.

D. VISITOR CHARACTERISTICS

1. Overview

The Japanese visitors to Canada are dominated by two age groups: those persons between the ages of 20 and 29, and those persons who are over 60 years of age. In 1989, those between the ages of 20 and 29 made up 33.1% of all the Japanese travellers to Canada, and 31.1% of all Japanese outbound tourists. The travellers over 60 years of age accounted for 15.3% of the Japanese who visited Canada, and 10.7% of the total number of Japanese travelling overseas. While overrepresented in these two categories, the male travellers between the ages of 30 and 49 are significantly underrepresented in the mix of Japanese tourists visiting Canada; accounting for 26.2% of all Japanese overseas travellers, only 15.1% of the Japanese who visit Canada are in this demographic group[30].

Tourism Canada's *Travel Price / Value Perceptions* study found that the Japanese visitors that were sampled were well educated; over 90% of the sample had some post-secondary education. The visitors also had high income levels, with over one-half of those in the survey earning over $43,000 per year, and over 25% earning over $72,000[31].

The *Travel Price / Value Perceptions* study found that the occupations of the Japanese tourists were dominated by clerical workers (22% of the sample), professionals (21%), students (17%), and homemakers (14%). Very few (only 5%) of the visitors were blue collar workers[32].

2. Segmentation

The Japanese market can be segmented into a number of clearly defined units, each of which is discrete from the other segments.

a. "Single Office Ladies" or "S.O.L.s"

This segment consists of the young, single women who want to see the world before they "settle down" to a career and family life. Over 20% of the Japanese visitors to Canada are women between the ages of 20 and 29[33] (although some of these may be honeymooners rather than "S.O.L.s"; see

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[30] Japan Airlines, *Overseas Travel Market To and From Japan '90*, JAL Marketing Report, Tokyo, August, 1990, p. 19.

[31] Tourism Canada, *Travel Price / Value Perception Study*, Volume III (Exit - Mailback Survey Report) (draft), January, 1991.

[32] Tourism Canada, *Travel Price / Value Perception Study*, Volume III (Exit - Mailback Survey Report) (draft), January, 1991.

[33] Japan Airlines, *Overseas Travel Market To and From Japan '90*, JAL Marketing Report, Tokyo, August, 1990, p. 19.

below). As discussed earlier, one study found that 21% of the Japanese visitors to Canada were in clerical occupations[34].

The "office lady" tourist tends to travel in a package tour with friends from work or college. The focus of the tour is on shopping, and to a lesser extent, sports.

One pundit has noted that these young women have begun to demand "a trip with a difference", generating a new type of product: "brush up tours". One example is a ten-day trip to a Swiss chateau, with business English classes, computer training, and sports activities (all for 600,000 yen, or about $6,000)[35].

A segment made up of the male equivalent of single office ladies has begun to arise, and represent many of the skiers visiting British Columbia. An opportunity exists for B.C. to capture a larger share of this market, particularly as these young men become more interested in active holidays and less familiar destinations.

b. **Honeymoon Couples**

Honeymoon couples account for a significant portion of the tourist traffic out of Japan. Statistics show that up to 93% of the 700,000 Japanese couples (1.4 million people) who get married each year enjoy a honeymoon overseas[36].

As noted above, over 20% of the Japanese visitors to Canada are women between the ages of 20 and 29; almost 13% are men in the same age range[37]. Many of these people will be honeymooners.

During the peak of the wedding seasons in Japan (spring and autumn), 70 to 80 per cent of all Japanese visitors to Alberta and B.C. on package tours are honeymoon couples[38]. This is an important off-season market whose potential needs to be developed.

Canada and the U.S. mainland, as one tourist destination area, have seen their share of the Japanese honeymoon travel dwindle over the last decade.

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[34] Tourism Canada, *Travel Price / Value Perception Study*, Volume III (Exit - Mailback Survey Report) (draft), January, 1991.

[35] "What Young Women Want", *Focus Japan*, Vol. 16, No. 6, June, 1989.

[36] Tourism Research Group, *Selling Travel to the Asia Pacific*, July, 1989, p. 16.

[37] Japan Airlines, *Overseas Travel Market To and From Japan '90*, JAL Marketing Report, Tokyo, August, 1990, p. 19.

[38] Tourism Research Group, *Selling Travel to the Asia Pacific*, July, 1989, p. 16.

In 1978, 24% of honeymooners chose this area as a destination; by 1988 the share had slipped to 4%. Hawaii has suffered even more; it went from a 47% share to 17% share. The bulk of honeymoon travellers now go to Australia (23%), Guam (19%) and Europe (16%). This change in destination choices has been variously attributed to Australia's aggressive marketing, a desire to go somewhere "new", and an increased desire to see fewer fellow Japanese while on vacation[39].

A recent survey in Japan, undertaken during the Gulf War, found that the most popular destinations for honeymoon travel were Australia (22.2%), Hawaii (20.4%), Europe (15%, an 8% decline from the previous year that may be directly attributed to the war), and the continental U.S. (14.7%)[40]. The table below details the study's findings.

PREFERRED HONEYMOON DESTINATIONS: 1991[41]

Destination	% respondents
Australia	22.2%
Hawaii	20.4%
Europe	15.0%
U.S.A.	14.7%
Canada	8.7%
New Zealand	5.3%
South Pacific	5.0%
Southeast Asia	3.8%
Guam/Saipan	3.8%

Much of the honeymooner's shopping is for souvenirs, and frequently involves buying the same item for a dozen friends and relatives[42].

c. **Retired Couples**

This segment is often referred to as the "silver" market.

Like all western industrialized nations, Japan's population is aging. By 2000, 1 in 5 people (20% of the total population) in Japan will be over 60 years of

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[39] Tourism Research Group, *Selling Travel to the Asia Pacific*, July, 1989, p. 18, Exhibit 4.

[40] "Gulf War Disrupts Honeymoon Market", *Travel Journal International*, April 22, 1991, pp. 2-3.

[41] "Gulf War Disrupts Honeymoon Market", *Travel Journal International*, April 22, 1991, pp. 2-3.

[42] Crooks, Lucy, *Japan Outbound* (draft), January, 1991.

age; by 2020 1 in 4 (25%) will be over 60[43]. It is projected that in the year 2000, 14% of the Canadian population will be over 60 years of age, although nearly 20% of British Columbians will be older than 60 at that time[44]. The proportion of retirees in the Japanese population will be the highest of any industrialized nation in the world for many years. This phenomenon is due to the fact that Japan never experienced a "Baby Boom" following World War II; contrary to the experience of Canada and the United States, the birth rate actually declined[45].

Canada is an attractive destination for this segment; currently over 15% of the Japanese visitors are over the age of 60. This is a significantly higher proportion of "silver" travellers than the U.S. attracts; only 8% of the visitors to the west coast region of the United States are over 60 years of age[46].

Like retirees in North America, the Japanese "silver" generation tend to travel at a more leisurely pace than their younger compatriots. Hence, there exists the opportunity for longer tours. It has also been noted that this segment of the population has a propensity to make return trips to a destination. An opportunity to generate repeat visits exists if the needs and desires of this tourist group are met during their first visit.

d. Student Travellers

There is a rapidly growing market of Japanese teenagers travelling overseas to study. These students go on "study tours" and "homestays".

It is estimated that upwards of 100,000 Japanese students travel overseas each year, primarily to Europe and western North America. Further, the schools in Japan have been organizing more trips overseas.

The success of the English language school in Nelson is evidence of the importance of an educational experience in the travel patterns of young Japanese.

e. Skiers

Research conducted in 1986 found that 18% of Japanese long-haul travellers consider snow skiing either somewhat important or very important in their

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[43]Tourism Australia, *Japan Market Brief* (4th ed.), 1988, p. 9.

[44]Statistics Canada; Planning and Statistics Division, Ministry of Finance, British Columbia.

[45]Stoffman, Daniel, "Completely Predictable People", *Globe and Mail Report on Business Magazine*, Vol. 7, No. 5, November, 1990, p. 81.

[46]Japan Airlines, *Overseas Travel Market To and From Japan '90*, JAL Marketing Report, Tokyo, August, 1990, p. 19.

choice of travel destination. This translates into a market size of roughly 850,000 Japanese[47].

Clearly B.C. is well positioned to address the needs of this market. The success of Whistler in attracting Japanese skiers attests to the quality of the experience offered in the province. Estimates for the 1989-90 season indicate that between 12,000 and 20,000 Japanese skiers visited Whistler Village[48]. For the 1990-91 season, it has been estimated that this number rose to 22,000[49].

Tourism Canada's study of the Japanese pleasure travel market took a different approach to segmenting the market, based on the travel product the tourist wishes to enjoy. The study identified three key segments with the greatest potential for Canadian marketing efforts: Culture and Comfort, Culture and Nature, and the Ski market (discussed earlier)[50].

The Culture and Comfort segment represents 21% of the Japanese market, and is primarily the "silver" market discussed above. They are interested in the historic and cultural elements of the destination they visit. They also desire first class hotels along with high quality restaurants.

The Culture and Nature segment most closely equates with the "single office ladies" and represents 13% of the Japanese market. The desires of this segment are similar to the Culture and Comfort segment, in their wish to see the historical and cultural attributes of the destination. The primary difference in the two segments is seen in the "Nature" element of the Culture and Nature segment. Wildlife, birds, and outstanding scenery are important attributes of the potential destination. Clearly Canada, and particularly B.C., are well positioned to meet the needs of this segment of the Japanese market.

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[47] Tourism Canada, *Market Assessment: Japanese Pleasure Travellers*, August, 1988, p. 12.

[48] Daniels, Alan, "B.C. Project Succeeds in Enticing Japanese", *Vancouver Sun*, April 27, 1990.

[49] Daniels, Alan, "22,000 Japanese Expected to Ski Whistler", *Vancouver Sun*, April 27, 1991, p. C2.

[50] Tourism Canada, *Market Assessment: Japanese Pleasure Travellers*, August, 1988.

UNITED KINGDOM VISITORS TO BRITISH COLUMBIA

SYNOPSIS [*]

Number of visitors:	134,094
Increase over 1989:	2.9%
B.C.'s share of British visitors to Canada:	22.3%
Percentage of overseas visitors to B.C.:	16.5%
Percentage of total tourist volume in B.C.:	0.6%
Total revenue generated in B.C.:	$56 million
Percentage of total tourist revenue in B.C.:	1.1%

Trip Characteristics

Length of stay:		9.8 days
Trip length (1989; Canada):		26.4 days
Spending: $43 per person per day		
Party size (1989; Canada):		2.0 persons
Purpose (1989; Canada):	Visit friends and relatives:	51%
	Pleasure holiday:	21%
Type of trip (1989; Canada):	83% "visiting friends and relatives"	
Season of visit:	June to September:	62%
	August:	18.5%
Accommodation (1989; Canada):	75% with friends and relatives	

Visitor Characteristics (1989; Canada)

Age:	average 46 years old
Education:	50% some post-secondary education
Income:	47% under $31,000
	18% over $62,000

[*] Note: all statistics are from 1990 unless otherwise indicated.

UNITED KINGDOM

A. MARKET SIZE

1. Size of the U.K. Travel Market

In 1988, residents of the United Kingdom made 5.1 million long-haul trips. In 1990, the number rose to 5.9 million. Canada was the destination of choice for 10% of those trips. Canada was the second most popular destination, a distant second to the 1.74 million trips (34% of the total) which were made to the United States[51]. (Note that these figures do not include the short-haul travel of British residents to other destinations within Europe.)

Tourism Canada has predicted that visitation to Canada will drop by 1.5% in 1991, followed by 1 to 1.5 per cent growth in the four years following[52]

2. Number of Visitors to British Columbia[53]

British visitors represent one of represent one of the largest markets of overseas tourists to B.C.; in 1990 they accounted for 17% of the overseas travellers visiting the province, as shown in Figure 3. 1990 saw a total of 134,000 British residents visit B.C., exceeded only by the Japanese.

In 1990, 2.9% more persons from the U.K. visited B.C. than in 1989, as shown in Figures 1 and 2. Canada as a whole, by comparison, saw a drop of 2.0% in visitation by British tourists. As mentioned earlier, Tourism Canada has predicted this national trend will continue, with a drop in visitation of 1.5% in 1991, followed by 1 to 1.5 per cent growth in the four years following[54]. However, this trend does not appear to apply to B.C., as the 1989 and 1990 statistics show that changes in visitation rates to B.C. has run contrary to the national trend.

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[51] Edwards, Anthony, *The European Long Haul Travel Market: Forecasts to 2000*, Special Report 2131, Economic Intelligence Unit, London, March, 1991.

[52] Tourism Canada, *International Forecasts In Brief*, presented at Federal-Provincial-Territorial Conference of Ministers of Tourism, July, 1991. An accompanying graph is included in Appendix B.

[53] Unless otherwise noted, the source of the data in this section is Statistics Canada, *Touriscope: International Travel. National and Provincial Counts*, Catalogue 66-001.

[54] Tourism Canada, *International Forecasts In Brief*, presented at Federal-Provincial-Territorial Conference of Ministers of Tourism, July, 1991.

The number of British visitors who enter B.C. and Canada is tabulated below:

Total British Entries[55]

British Columbia:		
	1989:	107,035
	1990:	110,117
	% increase:	2.9%
Canada:		
	1989:	614,771
	1990:	602,401
	% increase:	-2.0%

The total number of British visitors to B.C., including those who enter Canada via another province and then travel to B.C., is given below:

Total British Visitation to B.C.[56]

1989:	130,341
1990:	134,094
% increase:	2.9%

Figures for the first four months of the year show that visitation by British residents was up by 24.4% in 1991, compared to an increase of 4.6% for Canada as a whole. In terms of the actual number of visitors, British Columbia experienced a greater increase in visits by U.K. residents than Canada as a whole. That is to say, B.C.'s share of the Canadian market increased during this period.

2. Visitor Nights

British visitors spent 1.3 million visitor nights in B.C. in 1990. This is the most visitor nights of any single overseas visitor group; see Figure 4. A greater number of Japanese visitors come to B.C., but their stays are significantly shorter than those of British visitors (as shown in Figure 6)[57].

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[55] Statistics Canada, *Touriscope: International Travel. National and Provincial Counts*. Catalogue 66-001.

[56] Tourism B.C. estimate.

[57] Tourism B.C. estimate.

3. B.C.'s Share of the Canadian Market

Of the 600,000 U.K. residents who visit Canada each year, over 18% enter via British Columbia. Another 4% of the visitors (roughly 24,000), enter the country in another province, and then travel to B.C.

Tourism Canada's *Travel Price / Value Perceptions Study* found that British tourists to Canada tend to visit two regions of the country. Thirty-eight per cent of the British visitors travelled to the western region (B.C., Alberta, and the Yukon and Northwest Territories) and another 46% gave Ontario as being their primary destination[58]. Since most British tourists to Canada come to visit friends and relatives, they will travel to those regions where the bulk of the population resides. The table below details the destinations of visitors from the U.K.:

REGION OF LONGEST STAY

Province	% respondents
BC, Alta, NWT, Yukon	38%
Sask, Manitoba	7%
Ontario	46%
Quebec	3%
Atlantic	3%

The table below shows all the regions of Canada visited by a sample of British travellers in the three years prior to the survey; multiple choices and multiple trips were permitted. Unfortunately, it is impossible to determine how many of the tourists visited the two regions on two different trips.

Note that the visitation patterns given below are quite different than those above.

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[58] Tourism Canada, *Travel Price / Value Perception Study*, Volume III -- Exit - Mailback Survey Report, January, 1991, Exhibit 3.3, between pp. 13-14.

REGIONS VISITED[59]

Province	% respondents
BC	(31%)
Vancouver	23%
Vancouver Island	10%
Ontario	(71%)
Niagara Falls	44%
Toronto	52%
Ottawa	15%
Quebec	(25%)
Montreal	19%
Quebec City	8%
Alberta	(23%)
Calgary	14%
Banff	8%

A study conducted by Tourism Canada in 1988 found that of all long-haul trips taken by British tourists over a three year period, Canada was the destination for 16% of the trips. This made Canada the second most popular destination, equal to the Far East/Asia market. The U.S.A. was the most popular choice, gathering 48% of the trips. Only 10% cited Canada as being their "preferred destination". The two destinations which were more "preferred" than "visited" were the Far East/Asia and Australia/New Zealand[60]. (See the table below.)

OVERSEAS LONG-HAUL TRIPS[61]

Destination	% of Trips	Pref. Destination
U.S.	48%	27%
Far East/Asia	16%	26%
Canada	16%	10%
Australia/New Zealand	12%	22%
Central/South Africa	8%	6%
Caribbean	7%	5%
Central/South America	2%	3%
Mexico	2%	1%

[59] Market Facts, *Pleasure Travel Markets To North America: United Kingdom, France, West Germany and Japan. Highlights Report*, Tourism Canada, October, 1989, p. 7.

[60] Market Facts, *Pleasure Travel Markets To North America: United Kingdom, France, West Germany and Japan. Highlights Report*, Tourism Canada, October, 1989, p. 4.

[61] Market Facts, *Pleasure Travel Markets To North America: United Kingdom, France, West Germany and Japan. Highlights Report*, Tourism Canada, October, 1989, p. 4.

The same study determined interest and awareness of various destinations in Canada; the results are tabulated below. Ontario scores higher on both "interest" and "awareness" than does B.C. These statistics are quite different than the actual visitation rates discussed earlier.

REGIONAL INTEREST[62]

Province	% Awareness	% Interest
BC	(82%)	(53%)
Vancouver	63%	36%
Rocky Mountains	22%	12%
Ontario	(95%)	(74%)
Niagara Falls	65%	42%
Toronto	60%	31%
Ottawa	30%	7%
Quebec	(79%)	(41%)
Montreal	56%	25%
Quebec City	23%	8%
Alberta	(53%)	(24%)
Calgary	36%	14%

B. REVENUE GENERATED

It has been calculated that U.K. residents who visited British Columbia during 1990 spent $56 million, or about $418 per visitor per day. This is 14.8% of the revenue generated by overseas tourists (see Figure 5), or 1.1% of the province's total tourism revenue[63].

C. TRIP CHARACTERISTICS

1. General Statistics

The average length of stay in B.C. of British visitors is 9.8 nights (see Figure 6). The expenditures over that time is about $418 per person, or $43 per visitor per day (as shown in Figures 7 and 8)[64].

A study of U.K. residents visiting Canada found that the average trip length was 26.4 days, and costs $4245 per party. (Note that these figures *do not* refer to length of

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[62] Market Facts, *Pleasure Travel Markets To North America: United Kingdom, France, West Germany and Japan. Highlights Report*, Tourism Canada, October, 1989, p. 30.

[63] Tourism B.C. estimate.

[64] Tourism B.C. estimate.

stay in Canada and expenditures made in Canada.) The average party size was found to be 1.98 persons. The most frequently used form of accommodation was staying with friends and relatives, cited by 75% of those sampled; this mirrors the trip purpose, discussed below[65].

2. Trip Purpose

Over one half the U.K. tourists who come to Canada do so to visit friends and relatives. Of all the overseas visitors, this is by far the highest percentage rate of visiting friends and relatives. Just over 20% come on pleasure, and roughly 10% come on business[66]. The trip purpose of British visitors to Canada is shown graphically in Figure 11.

Not only is visiting friends and family the main trip purpose, the majority British tourists also stay in the homes of their friends and family in Canada rather than in paid accommodations such as hotels and motels[67].

Family and friends also figure significantly as an information source when the visitors are making the decision to come to Canada, and when they are choosing destinations within Canada to visit[68].

3. Seasonality of Visits

Like most tourist groups, British visitors tend to travel to B.C. during the summer. In 1990, 62% of all the British visitors who came to the province did so in the four months between June 1 and September 30. The month-by-month visitation of British tourists to B.C. is shown in Figure 12.

D. VISITOR CHARACTERISTICS

1. Overview

A survey of British pleasure travellers leaving Canada found that they had an average age of 46 years old. Most were either retired or were in blue collar occupations. Perhaps related to these facts, many had comparatively low incomes;

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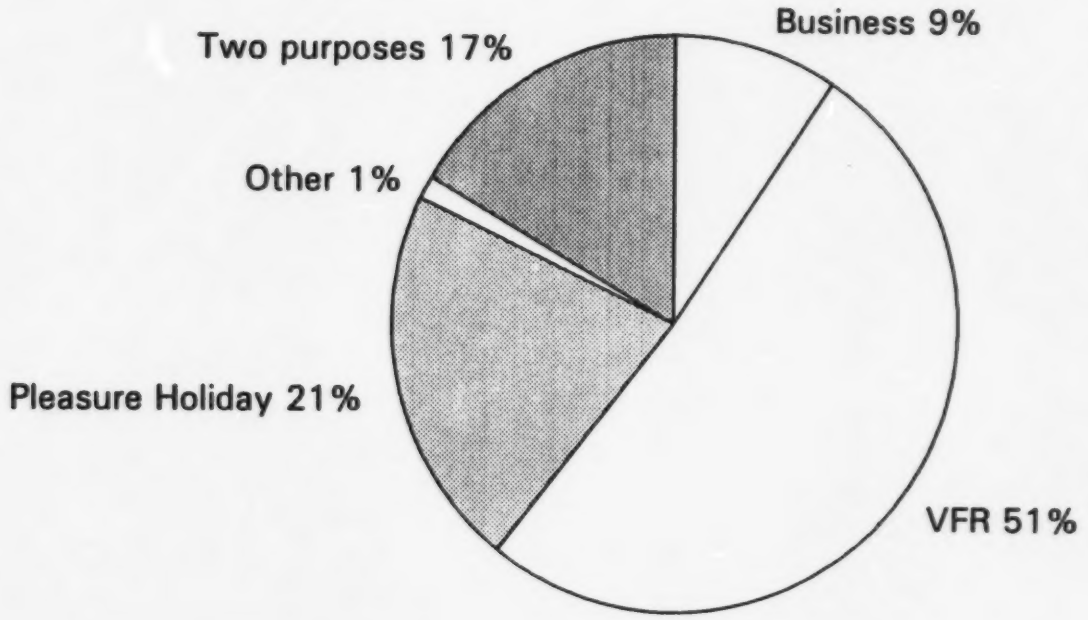
[65] Tourism Canada, *Travel Price / Value Perception Study*, Volume III -- Exit - Mailback Survey Report, January, 1991.

[66] Statistics Canada, *Touriscope: International Travel. Travel Between Canada and Other Countries*, Catalogue 66-201.

[67] Tourism Canada, *Travel Price / Value Perception Study*, Volume III -- Exit - Mailback Survey Report, January, 1991, Exhibit 3.3, between pp. 13-14.

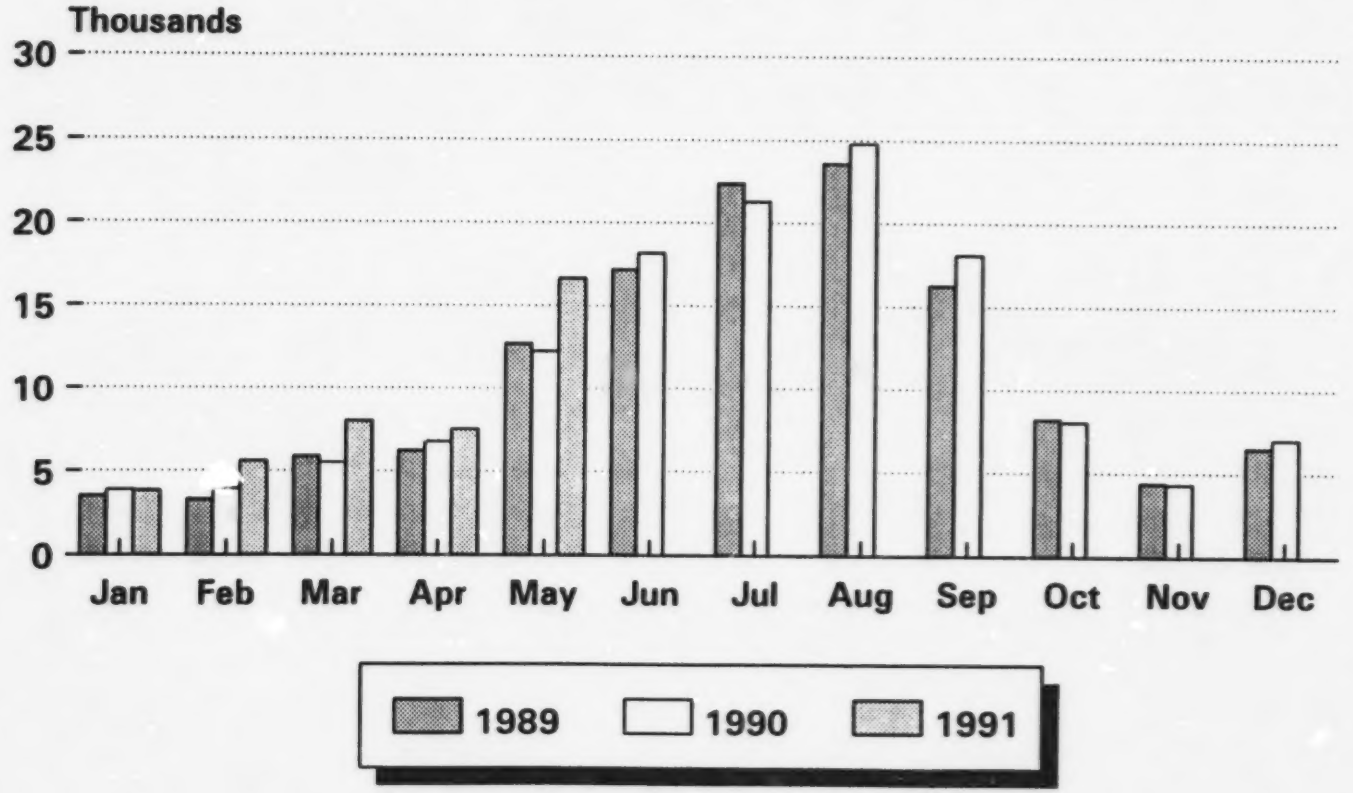
[68] Tourism Canada, *Travel Price / Value Perception Study*, Volume III -- Exit - Mailback Survey Report, January, 1991, Exhibit 3.3, between pp. 13-14.

Figure 11
Trip Purpose
U.K. Visitors To Canada



source: Statistics Canada, 1989

Figure 12
U.K. Visitors to B.C.
Monthly Visitation 1989-91



Source: Statistics Canada, Tourism B.C.

47% of the sample had annual incomes under $31,000. Further, many had a rather low education level; 50% of those surveyed had completed no more than high school. Only 9% of the Japanese visitors questioned had no post-secondary education[69].

2. Segmentation

Tourism Canada conducted a survey of British pleasure travellers in 1988 which identified seven different product segments. Of the seven, the Culture and Comfort, Big City, Sports and Entertainment, Outdoor Sports, and Culture and Nature segments were identified as being of high priority for market development to Canada[70].

i. Culture and Comfort travellers (16% of the market) are more interested in historical and archaeological sites, and museums and art galleries. They also have a tendency to use short guided tours, and have a tendency to be shoulder-season travellers. This segment expressed above average interest in destinations in western Canada such as Vancouver, the Rocky Mountains, and Banff National Park.

ii. The Big City travel segment represents 15% of the market. Persons in the segment look for high quality hotels and restaurants, nightlife, and good shopping. Notably, this segment tends to be older (61% over 44) and female (74%), travelling to visit friends and family.

iii. Persons in the Sports and Entertainment segment (14%) are interested in sports activities (hunting, fishing, skiing, golf, and hiking and climbing) both as a participant and as a spectator. Further, they enjoy casinos, nightlife, and theme parks.

iv. Those persons in the Outdoor Sports segment, which makes up 11% of the market, are interested in outdoor activities such as skiing and water sports, and wilderness and nature. This segment is made up of relatively young, well-educated, and well paid people.

v. Culture & Nature travellers (12%) are interested in cultures other than their own, and nature related features such as wildlife, wilderness, and outstanding scenery. In many ways, it appears as though this segment is a combination of the Culture and Comfort and Outdoor Sports segments They exhibit above average interest in Canada as a destination, specifically the Rockies and Klondike National Park.

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[69] Tourism Canada, *Travel Price / Value Perception Study*, Volume III -- Exit - Mailback Survey Report, January, 1991.

[70] Tourism Canada, *Market Assessment: British Pleasure Travellers*, 1988, pp. 26-27.

GERMAN VISITORS TO BRITISH COLUMBIA

SYNOPSIS [*]

Number of visitors:	77,280
Increase over 1989:	-2.3%
B.C.'s share of German visitors to Canada:	26.6%
Percentage of overseas visitors to B.C.:	9.5%
Percentage of total tourist volume in B.C.:	0.3%
Total revenue generated in B.C.:	$40 million
Percentage of total tourist revenue in B.C.:	0.8%

Trip Characteristics

Length of stay:		10.5 days
Trip length (1989; Canada):		23 days
Spending:		$50 per person per day
Party size (1989; Canada):		2.1 persons
Purpose (1989; Canada):	Visit friends and relatives:	36%
	Pleasure holiday:	33%
	Business:	11%
Type of trip (1989; Canada):	51% "visiting friends and relatives"	
	33% "to see scenery and nature"	
Season of visit:	June to September:	64%
	August:	19.6%
Accommodation):	44% with friends and relatives	
	22% camping and trailer park facilities	

Visitor Characteristics (1989; Canada)

Age:	average 42 years old
Education:	38% no post-secondary education
	21% university degree
Income:	28% under $30,000
	41% over $45,000

[*] Note: all statistics are from 1990 unless otherwise indicated.

GERMANY

A. MARKET SIZE

1. Size of the German Travel Market

In 1988 German residents made 3,219,000 long-haul trips; in 1989 this rose slightly to 3,279,000 long-haul trips. Canada was the destination for 8% of these trips[71].

Tourism Canada's long-range forecast is for a drop in the number of German visitors to Canada in 1991 and 1992, continuing a trend that began in 1989. This will be followed by slow growth in the market between 1993 and 1995[72]. British Columbia saw growth in the number of German visitors in 1989, and a substantially slower decline in numbers during 1990 as was experienced nationally. The province is well positioned to continue to attract an increasing number of German tourists over the next few years.

2. Number of Visitors to British Columbia[73]

German tourists represent the third largest overseas market to British Columbia, accounting for about 9% of the total number of overseas travellers who visited the province in 1990 (as shown in Figure 3). This is down from a share of almost 12% in 1987.

Although the total number of Germans visiting both B.C. and Canada has dropped since 1989, B.C.'s share of Germans travelling to Canada increased from 19.5% in 1987 to 22.3% in 1990.

1990 saw a 2.3% decline in the number of German visitors to B.C. over the 1989 figures. (See Figures 1 and 2). Canada as a whole, by comparison, saw a much larger drop of 5.8% in visitation by German tourists.

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[71] Edwards, Anthony, *The European Long Haul Travel Market: Forecasts to 2000*, Special Report 2131, Economic Intelligence Unit, London, March, 1991.

[72] Tourism Canada, *International Forecasts In Brief*, presented at Federal-Provincial-Territorial Conference of Ministers of Tourism, July, 1991. An accompanying graph is included in Appendix B.

[73] Unless otherwise noted, Statistics Canada, *Touriscope: International Travel: National and Provincial Counts*, Catalogue 66-001 is the source of all the data in this section.

The total number of Germans entering B.C. and Canada is given below:

Total German Direct Entries

British Columbia:		
	1989:	68,473
	1990:	66,926
	% increase:	-2.3%
Canada:		
	1989:	308,511
	1990:	290,539
	% increase:	-5.8%

The total number of German visitors to B.C. (both direct and indirect entries) is given below:

Total German Visitation[74]

British Columbia:		
	1989:	79,066
	1990:	77,280
	% increase:	-2.3%

During January to April 1991, the number of German tourists entering B.C. increased by 5.3% over the visitation for the same period in 1990. This is compared to an increase of 10.4% to Canada as a whole during the first four months of the year.

2. Visitor Nights

During 1990, German visitors to B.C. spent over 808,000 visitor nights in the province. This is 12.4% of the overseas markets (see Figure 4), the third most after tourists from the U.K. and Japan.

3. B.C.'s Share of the Canadian Market

In 1990, 23% of all the German visitors to Canada entered via British Columbia. Another 3.6% of the visitors (just over 10,000) entered Canada through another province, and then travelled to B.C.[75]

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[74]Tourism B.C. estimate.
[75]Tourism B.C. estimate.

In 1988, Canada was the destination for over 8% of the 3.2 million long-haul trips made by German residents. Canada was the second most popular destination, a distant second to the 1.1 million trips (34% of the total) which were made to the United States[76].

One study of German travellers found that of all long-haul trips taken over a three year period, Canada was the destination for 6% of the trips. The U.S.A. was the most popular choice, gathering 32% of the trips. The U.S.A. was also the most popular "preferred destination"; the two destinations which were more "preferred" than "visited" were the Far East/Asia and Australia/New Zealand[77]. (See the table below.)

OVERSEAS LONG-HAUL TRIPS[78]

Destination	% of Trips	Pref. Destination
U.S.	42%	32%
Far East/Asia	16%	22%
Central/South Africa	11%	8%
Canada	7%	6%
Australia/New Zealand	7%	12%
Caribbean	7%	8%
Central/South America	6%	8%
Mexico	4%	4%
Other	3%	1%

The same study determined interest and awareness (as opposed to actual visitation) of various destinations in Canada; the results are tabulated below. Ontario and Quebec score higher on both "interest" and "awareness" than does B.C. These statistics are quite different than the actual visitation rates found in Tourism Canada's *Travel Price/Value Perceptions* study; see below.

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[76]Edwards, Anthony, *The European Long Haul Travel Market: Forecasts to 2000*, Special Report 2131, Economic Intelligence Unit, London, March, 1991.

[77]Market Facts, *Pleasure Travel Markets To North America: United Kingdom, France, West Germany and Japan. Highlights Report*, Tourism Canada, October, 1989, p. 29.

[78]Market Facts, *Pleasure Travel Markets To North America: United Kingdom, France, West Germany and Japan. Highlights Report*, Tourism Canada, October, 1989, p. 29.

REGIONAL INTEREST[79]

Province	% Awareness	% Interest
BC	(66%)	(41%)
Vancouver	45%	24%
Victoria	16%	6%
Ontario	(90%)	69%
Niagara Falls	37%	30%
Toronto	54%	29%
Ottawa	36%	12%
Quebec	(82%)	(53%)
Montreal	65%	42%
Quebec City	17%	5%
Alberta	(55%)	(26%)
Calgary	39%	18%
Nfld/Labrador	(43%)	(21%)
Yukon	(32%)	(14%)
Manitoba	(30%)	(9%)
Winnipeg	21%	5%

Another study conducted by Tourism Canada found that German tourists to Canada tend to visit two regions of the country: the western region (B.C., Alberta, and the Yukon and Northwest Territories) and Ontario. Visitation is split evenly between the two regions. Since most German tourists to Canada come to visit friends and relatives, they will travel to those regions where the bulk of the population resides. The dramatic scenery of western Canada may also draw many German visitors. The table below details the destinations of German visitors:

REGION OF LONGEST STAY[80]

Province	% respondents
BC, AB, NWT, Yukon	41%
Sask, Manitoba	3%
Ontario	43%
Quebec	10%
Atlantic	3%

[79]Market Facts, *Pleasure Travel Markets To North America: United Kingdom, France, West Germany and Japan. Highlights Report*, Tourism Canada, October, 1989, p. 30.

[80]Tourism Canada, *Travel Price / Value Perception Study*, Volume III -- Exit - Mailback Survey Report, January, 1991, Exhibit 3.3, between pp. 13-14.

The table below shows all the regions of Canada visited by a sample of German travellers in the three years prior to the survey; multiple choices and multiple trips were permitted. Unfortunately, it is impossible to determine how many of the tourists visited the two regions on two different trips.

Note that the visitation patterns given below are quite different than those discussed earlier.

REGIONS VISITED[81]

Province	% respondents
BC	(21%)
Vancouver	15%
Ontario	(52%)
Niagara Falls	15%
Toronto	18%
Ottawa	10%
Quebec	(16%)
Montreal	10%

B. REVENUE GENERATED

German visitors to B.C. spent nearly $41 million in 1990. Each German visitor to the province spent approximately $50 per night stayed, or $529 per person per trip. This is 10.8% of the total revenue generated by overseas visitors to B.C. (see Figure 5), or 0.8% of the $5.2 billion dollars generated by the tourism industry in the province[82].

C. TRIP CHARACTERISTICS

1. General Statistics

The average length of time that German tourists stayed in B.C. was 10.5 nights. During that time, the tourist will spend an average of $529, or roughly $50 per person per day. For a comparison with other visitor length of stay, per diem expenditures, and total trip expenditures, see Figures 6, 7 and 8.

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[81]Market Facts, *Pleasure Travel Markets To North America: United Kingdom, France, West Germany and Japan. Highlights Report*, Tourism Canada, October, 1989, p. 32.

[82]Tourism B.C. estimate.

A study of German pleasure travellers to Canada found that the average trip length was 23 days, and cost nearly $5000 per party. The average party size was found to be 2.13 persons[83].

2. Trip Purpose

Germans who travel to Canada do so for two main reasons: to visit friends and relatives (accounting for 36% of the travel) and on pleasure vacations (roughly 33% of the trips). Business travel amounts to 11% of the total trips to Canada[84]. Figure 13 shows the trip purpose of German visitors to Canada.

Tourism Canada's recently completed *Travel Price / Value Perceptions* study found that most (51%) German tourists come to Canada to visit friends and family. Another large proportion (50%) come on touring trips, with the scenery and specific locations in Canada drawing them[85]. (These high numbers result from multiple answers being permitted.)

Although many German visitors to Canada stay with family and friends (44% cited it as their most frequent form of accommodation), a large number also use camping and trailer park facilities during their visit. No less than 32% of the sample in one survey stayed in campgrounds and trailer park facilities at some point during their trip to Canada, 22% of the sample saying that it was the most frequent type of accommodation used[86].

Friends and family serve as the primary source of information to German tourists, both in the decision to come to Canada and in determining which destinations in Canada to visit. It is unknown what portion of these friends and relatives are residents of Canada who are going to be visited, and how many are residents of Germany who are recommending Canada as a destination based on their own prior experiences.

3. Seasonality of Visits

As with most tourist markets, Germans visiting British Columbia do so in the summer. In 1990, August was the most popular month; 19.6% of the year's visitors

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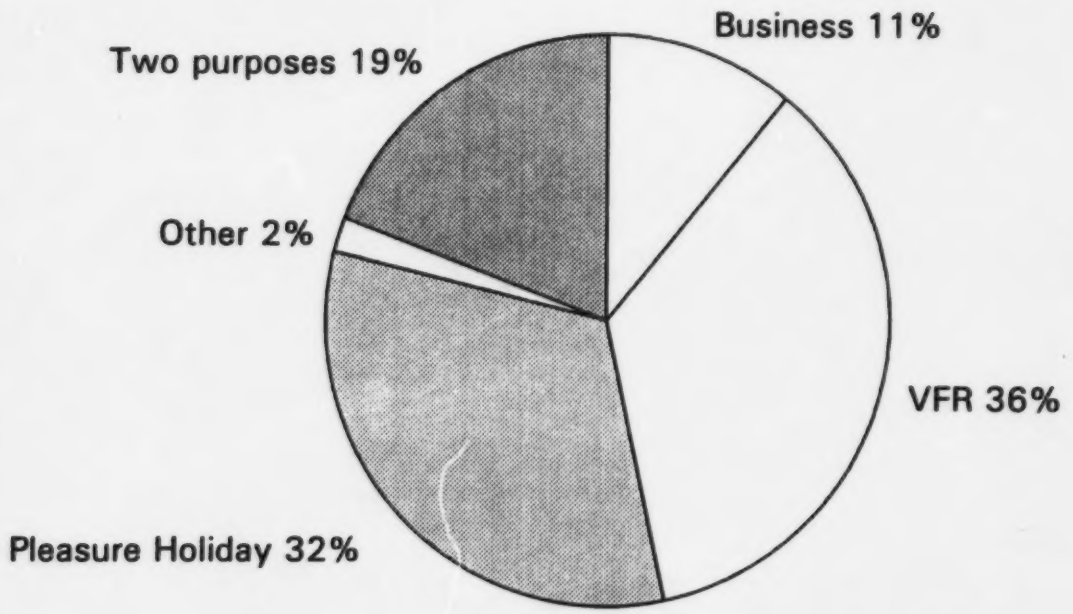
[83]Tourism Canada, *Travel Price / Value Perceptions Study*, Volume III -- Exit - Mailback Survey Report, January, 1991, Exhibit 3.3, between pp. 13-14.

[84]Statistics Canada, *Touriscope: International Travel: Travel Between Canada and Other Countries*, Catalogue 66-201.

[85]Tourism Canada, *Travel Price / Value Perceptions Study*, Volume III -- Exit - Mailback Survey Report, January, 1991, Exhibit 3.3, between pp. 13-14.

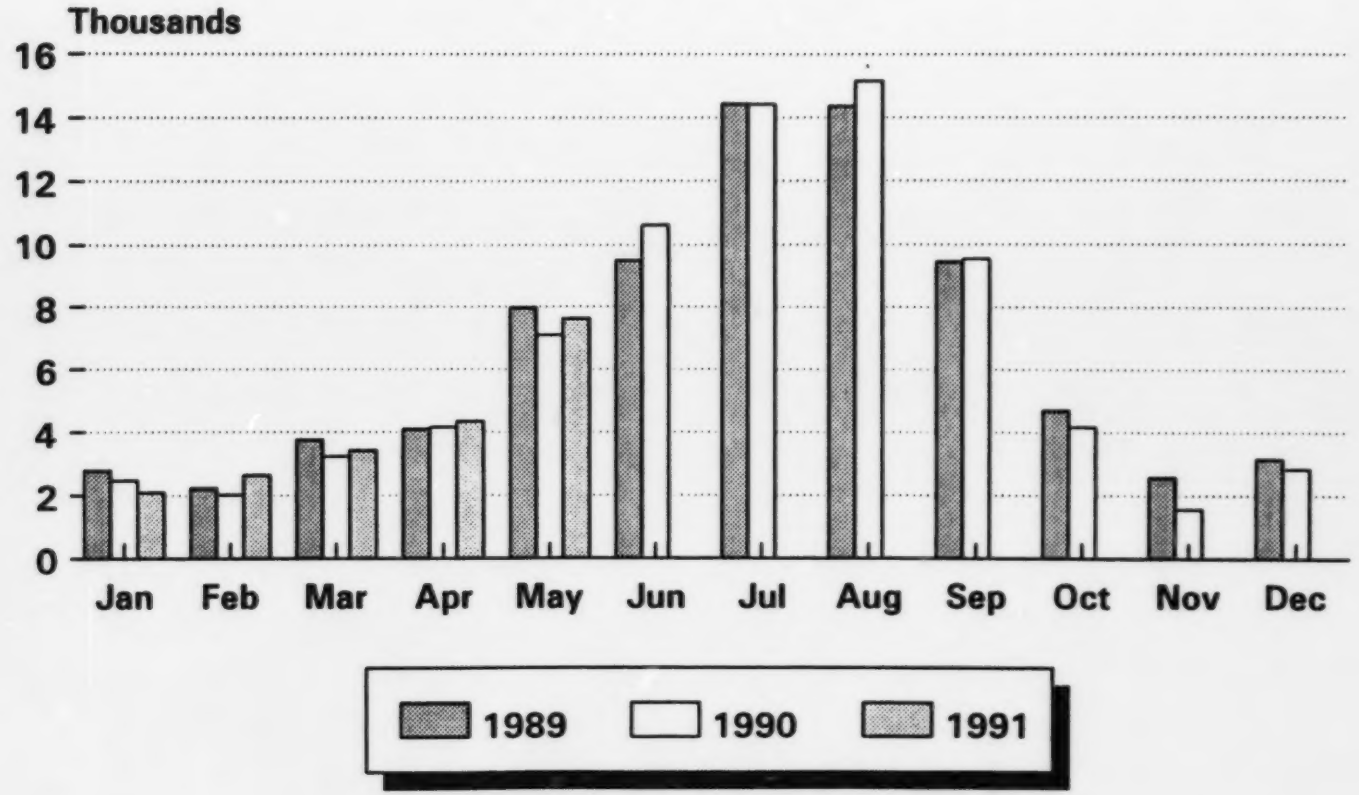
[86]Tourism Canada, *Travel Price / Value Perception Study*, Volume III -- Exit - Mailback Survey Report, January, 1991.

Figure 13
Trip Purpose
German Visitors To Canada



source: Statistics Canada, 1989

Figure 14
German Visitors to B.C.
Monthly Visitation 1989-91



Source: Statistics Canada, Tourism B.C.

came then. The four months between June 1 and September 30 saw the arrival of 64.3% of all the German tourists who came to B.C. during 1990[87]. The monthly visitation patterns of German visitors to B.C. is shown in Figure 14.

D. VISITOR CHARACTERISTICS

1. Overview

An exit survey of German pleasure travellers leaving Canada found that they had an average age of 42 years old. The visitors surveyed were frequently in professional and managerial occupations (39% of the sample).

41% of the sample of German visitors had annual incomes over $45,000, and 31% had incomes between $30,000 and $45,000. Further, many had a rather low education level; 38% of those surveyed had completed no post-secondary education of any sort. By comparison, 50% of the British visitors surveyed, but only 9% of the Japanese visitors to Canada, had no post-secondary education[88].

2. Segmentation

Tourism Canada's *Market Assessment: German Pleasure Travellers* (1989) identified six travel product segments. Of the six, the Cultural Touring and Sports and Entertainment segments were given high priority, and the Outdoor Sports and Culture and Nature segments were given medium priority for market development to Canada.

i. Cultural Touring travellers (representing 21% of the German travel market) have a desire to see such cultural attractions as historic cities, modern urban areas, museums and art galleries, and theatre and concerts. They are also interested in visiting areas with attractive scenery and other natural attractions. They exhibit above average interest in Canada as a destination.

As a group, these travellers tend to be older and with a lower education.

They have a greater than average tendency to travel to visit friends and relatives.

ii. Sports and Entertainment travellers account for 24% of those Germans who travel overseas. They are interested in participating in hunting and fishing, golf, tennis, and skiing. They are also interested in spectator sporting events,

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[87] Statistics Canada, *Touriscope: International Travel: National and Provincial Counts*, Catalogue 66-001.

[88] Tourism Canada, *Travel Price / Value Perception Study*, Volume III -- Exit - Mailback Survey Report, January, 1991.

and gambling, nightlife, and first-class hotels. It is for outdoor sports that Canada is an attractive destination for this segment of the German market.

iii. Outdoor Sports travellers (10% of the German market) enjoy rural-based outdoor activities, but without the emphasis on first-class accommodation and nightlife that characterizes the Sports and Entertainment segment. It is the availability of outdoor activities in mountainous, wilderness areas that makes Canada an attractive destination to this group of travellers.

The people in this segment tend to be male, under 35 years of age, and single.

iv. The Culture and Nature segment represents 12% of all German long-haul travellers. Many of the attributes of a destination that they seek are similar to the Cultural Touring segment: historical sites and cities, and cultural venues such as museums and art galleries. The significant differences are in their desire to also see natural attractions (scenery and wildlife), and their lack of emphasis on the quality of facilities.

Those Germans who make up this segment are often under 35 years of age, single, well educated, and of higher income than the average long-haul traveller.

HONG KONG VISITORS TO BRITISH COLUMBIA

SYNOPSIS [*]

Number of visitors:		73,766
Increase over 1989:		1.5%
B.C.'s share of Hong Kong visitors to Canada:		56.9%
Percentage of overseas visitors to B.C.:		9.1%
Percentage of total tourist volume in B.C.:		0.3%
Total revenue generated in B.C.:		$36 million
Percentage of total tourist revenue in B.C.:		0.7%

Trip Characteristics

Length of stay:		7.5 days
Spending:		$64 per person per day
Season of visit:	July and August:	32%
	July:	16.3%

[*] Note: all statistics are from 1990 unless otherwise indicated.

HONG KONG

A. MARKET SIZE

1. Number of Visitors to British Columbia[89]

The number of visitors to B.C. from Hong Kong has grown by fits and starts from being the fifth largest contributor of overseas visitors to the province in 1985, to being almost equal to the size of the German market by 1990. In that time, the number of Hong Kong residents visiting the province has increased from 25,522 in 1985 to 73,766 in 1990. (See Figures 1, 2 and 3.)

In 1990, 1.5% more persons from Hong Kong entered Canada through B.C. than in 1989. Canada as a whole, by comparison, saw an increase in visitation by Hong Kong residents of 5.3%. This information is tabulated below:

Hong Kong Entries

British Columbia:	
1989:	71,680
1990:	72,749
% increase:	1.5%
Canada:	
1989:	123,080
1990:	129,609
% increase:	5.3%

A not insubstantial number of Hong Kong residents enter Canada via another province, and then travel to B.C. The total number of visitors to B.C. from Hong Kong is tabulated below:

Hong Kong Visitors[90]

British Columbia:	
1989:	72,682
1990:	73,766
% increase:	1.5%

During the period January to April, the number of Hong Kong residents visiting B.C. in 1991 declined by 22.3% compared to the same period in 1990.

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[89]Unless otherwise noted, Statistics Canada, *Touriscope: International Travel: National and Provincial Counts*, Catalogue 66-001 is the source of all the data in this section.

[90]Tourism B.C. estimate.

2. Visitor Nights

Hong Kong residents spent a total of 553,000 visitor nights in B.C. in 1990, at a rate of 7.5 nights per visit[91]. This is 8% of the total number of visitor nights spent in B.C. by overseas visitors; see Figure 4.

3. B.C.'s Share of the Canadian Market

In 1990, 56% of all the visitors to Canada from Hong Kong entered via British Columbia. Another 1,000 visitors, roughly 1% of the total number of visitors, entered Canada through another province and then travelled to B.C.

The table below shows all the key destinations in Canada visited by a sample of Hong Kong travellers in the three years prior to the survey; multiple choices and multiple trips were permitted. Unfortunately it is impossible to determine how many of the tourists might have visited two destinations on two different trips, and how many visited two (or more) cities during a single visit.

REGIONS VISITED[92]

Destination	% respondents
Vancouver	85%
Toronto	80%
Ottawa	40%
Niagara Falls	37%
Victoria	12%

Of all long-haul trips taken by Hong Kong tourists over a three year period, Canada was the destination for 6% of the trips. The Far East/Asia market was the most popular choice, gathering 73% of the trips. Only 5% cited Canada as being their "preferred destination". The two destinations which dominated the "preferred" destinations were the Far East/Asia (49%) and Europe (21%)[93]. (See the table below.)

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[91] Tourism B.C. estimate.

[92] Market Facts, *Pleasure Travel Markets To North America: Switzerland, Hong Kong, Singapore. Highlights Report*, Tourism Canada, March, 1988, p. 27.

[93] Market Facts, *Pleasure Travel Markets To North America: Switzerland, Hong Kong, Singapore. Highlights Report*, Tourism Canada, March, 1988, p. 21.

OVERSEAS LONG-HAUL TRIPS[94]

Destination	% of Trips	Pref. Destination
Asia/South Pacific	73%	49%
Europe	10%	21%
Mainland U.S.	10%	12%
Canada	6%	5%
Australia/New Zealand	3%	8%
Other	2%	5%

The same study determined interest and awareness of various destinations in Canada; the results are tabulated below. The two key destinations are Toronto and Vancouver; all other Canadian cities are significantly lower in both awareness and interest levels.

INTEREST & AWARENESS[95]

Destination	% Awareness	% Interest
Toronto	92%	83%
Vancouver	91%	85%
Ottawa	59%	34%
Niagara Falls	43%	31%
Victoria	21%	8%
Montreal	13%	5%

B. REVENUE GENERATED

Nearly one-half of all the tourist expenditures made by Hong Kong residents in Canada occurs in B.C. In 1990, this amounted to over $35 million[96]. Hong Kong residents account for 0.3% of the total revenue of $5.2 billion generated by all travellers in B.C., or 9.4% of the revenue generated by overseas visitors to B.C. (as shown in Figure 5).

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[94]Market Facts, *Pleasure Travel Markets To North America: Switzerland, Hong Kong, Singapore. Highlights Report*, Tourism Canada, March, 1988, p. 21.

[95]Market Facts, *Pleasure Travel Markets To North America: Switzerland, Hong Kong, Singapore. Highlights Report*, Tourism Canada, March, 1988, p. 23.

[96]Tourism B.C. estimate.

C. TRIP CHARACTERISTICS

1. Provincial Statistics[97]

Each Hong Kong visitor to B.C. spent roughly $65 per night, and stayed an average of 7.5 nights per visit. Thus, the total expenditure per visit was $483. The various trip characteristics are shown graphically In Figures 6, 7 and 8.

2. Seasonality of Visits

Visitation of Hong Kong residents to B.C. peaks during July and August; roughly 16% of the annual total came to the province during each of those two months. Visitation is rather evenly spread out through the remainder of the year. This may be due to a high proportion of business travel amongst the Hong Kong residents. The monthly visitation of Hong Kong residents for the years 1989 and 1990, and the first 5 months of 1991, is shown in Figure 15.

D. VISITOR CHARACTERISTICS

1. Segmentation

The research of Tourism Canada identified two segments of the Hong Kong long-haul travel market whose demands matched the product offerings in North America: Outdoor Sports and Foreign Experience[98].

a. Outdoor Sports travellers make up 48% of the Hong Kong market. They wish to either participate in sports activities (ranging from hiking and climbing to golf), or to watch major sport events. It was noted in the research that the persons in this segment tend to be reserved travellers, and are more interested in the activity than travel itself.

   North America is well positioned to meet the needs of this market. British Columbia is particularly well endowed with quality ski facilities, world-class parks (both national and provincial), and other outdoor recreation opportunities.

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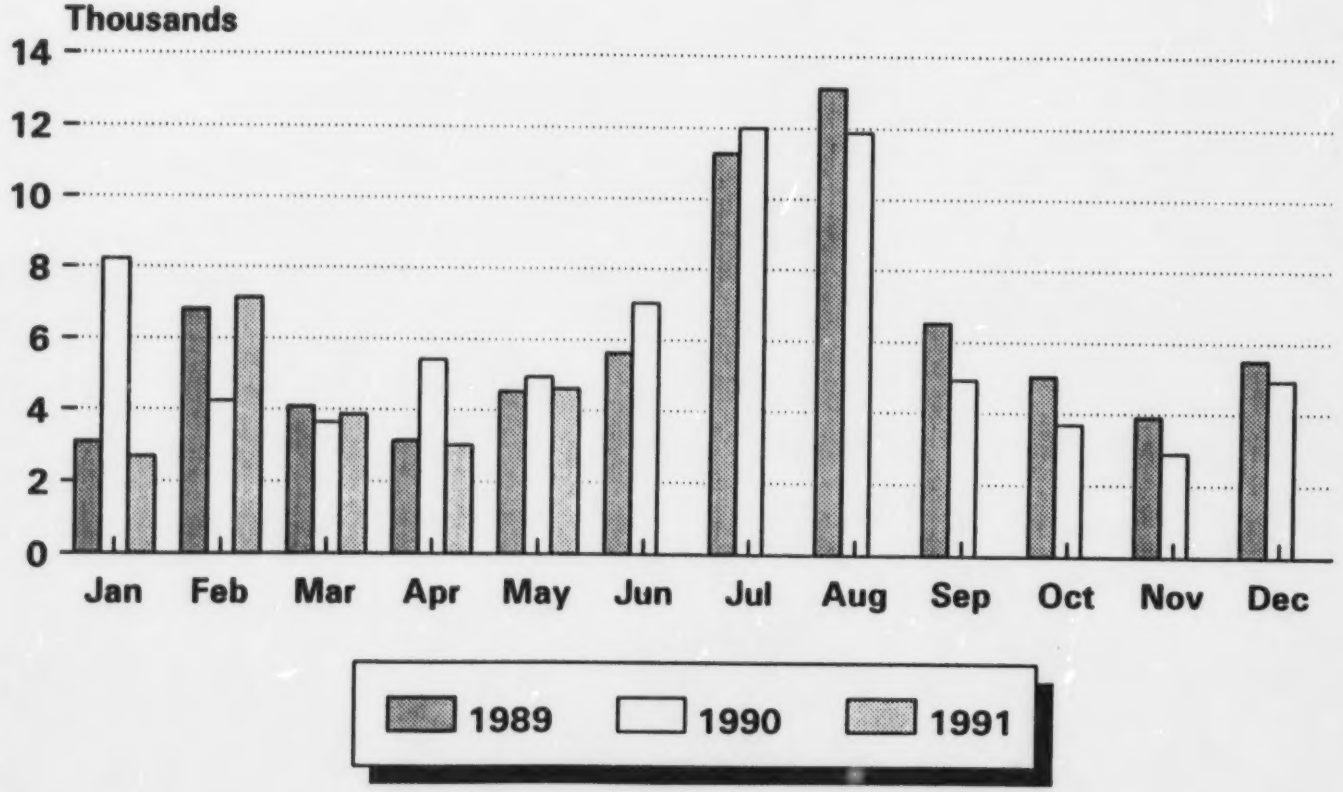
[97]Tourism B.C. estimates.

[98]Market Facts, *Pleasure Travel Markets to North America: Switzerland, Hong Kong, Singapore. Highlights Report*, Tourism Canada, March, 1988, pp. 26-27.

Figure 15
Hong Kong Visitors to B.C.
Monthly Visitation 1989-91



Source: Statistics Canada, Tourism B.C.

b. Those persons in the Foreign Experience segment (24% of the Hong Kong market) travel to enjoy an exotic atmosphere and outstanding scenery (as opposed to the urban environment of Hong Kong), and seek learning opportunities. They are often interested in package tours, particularly to those destinations in which they feel safe and secure. (Based on the limited information provided, it appears that this segment is similar to the "silver" segment of Japanese tourists.)

AUSTRALIAN VISITORS TO BRITISH COLUMBIA

SYNOPSIS [*]

Number of visitors:	58,535
Increase over 1989:	-1.6%
B.C.'s share of Australian visitors to Canada:	47.9%
Percentage of overseas visitors to B.C.:	7.2%
Percentage of total tourist volume in B.C.:	0.3%
Total revenue generated in B.C.:	$22 million
Percentage of total tourist revenue in B.C.:	0.4%

Trip Characteristics

Length of stay:		7.3 days
Spending:		$52 per person per day
Purpose (1989; Canada):	Pleasure holiday:	37%
	Visit friends and relatives:	36%
	Business:	12%
Season of visit:	June to September:	50%
	July:	14.9%

[*] Note: all statistics are from 1990 unless otherwise indicated.

AUSTRALIA

A. MARKET SIZE

1. Number of Visitors to British Columbia[99]

Australia is the fifth most important source of overseas travellers to B.C.. With the exceptions of 1987 and 1990, the number of Australians visiting B.C. has been steadily increasing over the last few years. This is shown graphically in Figures 1 and 2. In 1990, Australians accounted for about 7% of the visits made by overseas travellers to B.C. (as shown in Figure 3).

In 1990, 1.6% fewer Australians visited B.C. than in 1989. Canada as a whole, by comparison, saw an increase in visitation by residents of Australia of 1.6%.

The total number of Australians entering both B.C. and Canada as a whole is given below:

Total Australian Entries

British Columbia:		
	1989:	54,498
	1990:	53,646
	% increase:	-1.6%
Canada:		
	1989:	120,316
	1990:	122,294
	% increase:	1.6%

In addition to the Australians who enter Canada through British Columbia, a significant number enter the country via another province and then travel west to B.C. Taking these indirect entries into account yields the total number of Australian visitors to the province is tabulated below:

Total Australian Visits to British Columbia:[100]

1989:	59,465
1990:	58,535
% increase:	-1.6%

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[99]Unless otherwise noted, Statistics Canada, *Touriscope: International Travel: National and Provincial Counts*, Catalogue 66-001 is the source of all the data in this section.

[100]Tourism B.C. estimate.

During the first four months of 1991, the number of Australians entering B.C. dropped by 0.6% over the same period in 1990. In the first four months of 1991, the number of Australians entering Canada dropped by 5.7%.

2. Visitor Nights[101]

Australians spent nearly 428,000 visitor nights in B.C. during 1990, or about 7% of the total spent in B.C. by overseas visitors (see Figure 4). Each of the 58,000 visitors stayed for an average of 7.3 nights.

3. B.C.'s Share of the Canadian Market

Nearly one-half (48%) of all the Australians who visit Canada spend time in British Columbia.

The table below shows all the key destinations in Canada visited by a sample of Australian travellers in the three years prior to the survey; multiple choices and multiple trips were permitted. Unfortunately it is impossible to determine how many of the tourists might have visited two destinations on two different trips, and how many visited two (or more) cities during a single visit.

REGIONS VISITED[102]

Destination	% respondents
British Columbia	(75%)
Vancouver	63%
Rocky Mountains	18%
Vancouver Island.	17%
Alberta	(51%)
Banff Nat. Park	33%
Calgary	30%
Jasper Nat. Park	18%
Ontario	(49%)
Toronto	30%
Niagara Falls	27%
Quebec	(25%)
Montreal	17%
Quebec City	12%

[101]Tourism B.C. estimate.

[102]Market Facts, *Pleasure Travel Markets To North America: Italy, Australia, Brazil, Mexico. Highlights Report*, Tourism Canada, March, 1989, p. 28.

The same study found that of all long-haul trips taken by Australian tourists over a three year period, Canada was the destination for 7% of the trips. Europe was the most popular destination, gathering 37% of the trips. Canada was given as the "preferred destination" by 7% of the sample. The only region which was given more frequently as a "preferred" destination than as an actual area visited was Europe; 41% said it was their first choice as a place to visit[103]. (See the table below.)

OVERSEAS LONG-HAUL TRIPS[104]

Destination	% of Trips	Pref. Destination
Europe	37%	41%
Asia	36%	20%
Mainland U.S.	16%	14%
New Zealand	13%	5%
Other South Pacific	10%	2%
Hawaii/Guam/Samoa	8%	2%
Canada	7%	7%
Near/Middle East	5%	2%
Other	6%	7%

The same study also determined interest and awareness of various destinations in Canada; the results are tabulated below.

INTEREST & AWARENESS[105]

Destination	% Awareness	% Interest
Vancouver	61%	35%
Montreal	53%	27%
Quebec City	46%	21%
Toronto	37%	16%
Niagara Falls	45%	27%
Calgary	36%	15%
Rocky Mountains	22%	13%
Banff Nat. Park	20%	13%
Great Lakes	15%	6%
Ottawa	17%	4%

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[103]Market Facts, *Pleasure Travel Markets To North America: Italy, Australia, Brazil, Mexico. Highlights Report*, Tourism Canada, March, 1989, p. 22.

[104]Market Facts, *Pleasure Travel Markets To North America: Italy, Australia, Brazil, Mexico. Highlights Report*, Tourism Canada, March, 1989, p. 22.

[105]Market Facts, *Pleasure Travel Markets To North America: Italy, Australia, Brazil, Mexico. Highlights Report*, Tourism Canada, March, 1989, p. 22.

B. REVENUE GENERATED

During 1990, Australian tourists to B.C. made expenditures totaling $22 million, roughly 7% of the total of all overseas visitors. This amounts to 0.4% of the $5.2 billion that was generated by tourism activities in the province during the year, and 5.8% of the revenue generated by overseas visitors to British Columbia (see Figure 5)[106].

C. TRIP CHARACTERISTICS

1. Provincial Statistics[107]

Australian visitors to B.C. spend just over $51 per person per day over a 7.3 day trip. This means that over the course of their entire stay, each visitor spends a total of $376. The trip characteristics of Australian visitors to B.C., contrasted with other visitors to the province, are shown graphically in Figures 6, 7 and 8.

2. Trip Purpose

The bulk of Australian visitors to Canada are split between either visiting friends and relatives (36%) or enjoying a pleasure holiday (37%). Business trips account for 12% of the visits made to Canada by Australians[108]. (See Figure 16.)

3. Seasonality of Visits

One-half of the Australians who come to B.C. do so in the four months between June 1 and September 30. The monthly visitation patterns of Australians to B.C. is shown i Figure 17.

D. VISITOR CHARACTERISTICS

1. Segmentation

The research of Tourism Canada identified two key market segments whose demands match the product offerings in Canada: Action Getaway travel benefit segment and the Nature and Culture product segment[109].

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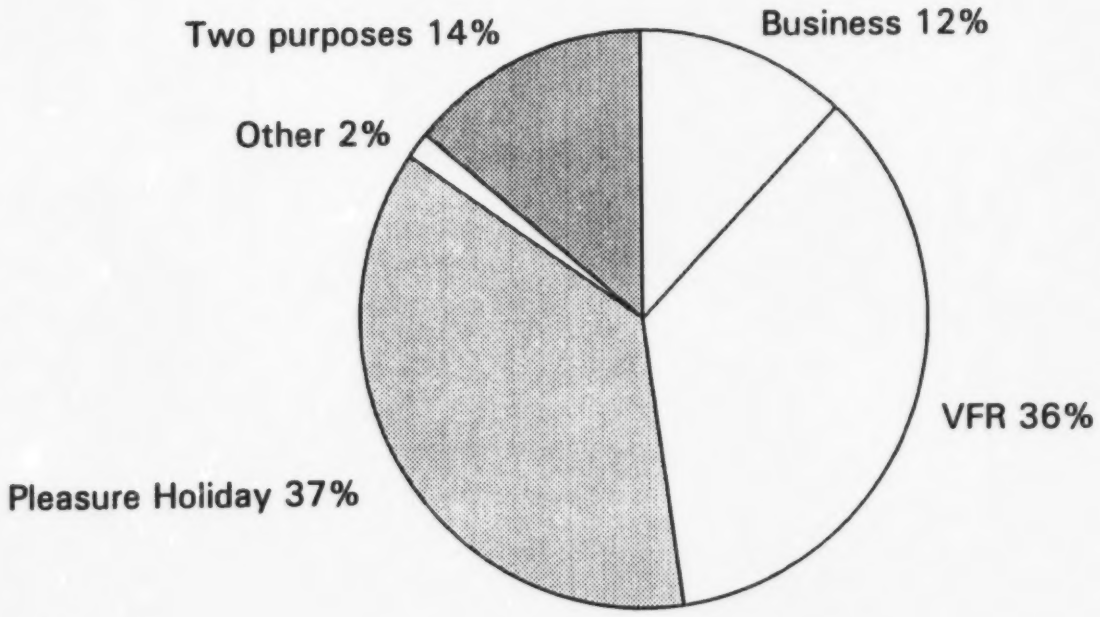
[106]Tourism B.C. estimate.

[107]Tourism B.C. estimates.

[108]Statistics Canada, *Touriscope: International Travel: Travel Between Canada and Other Countries*, Catalogue 66-201.

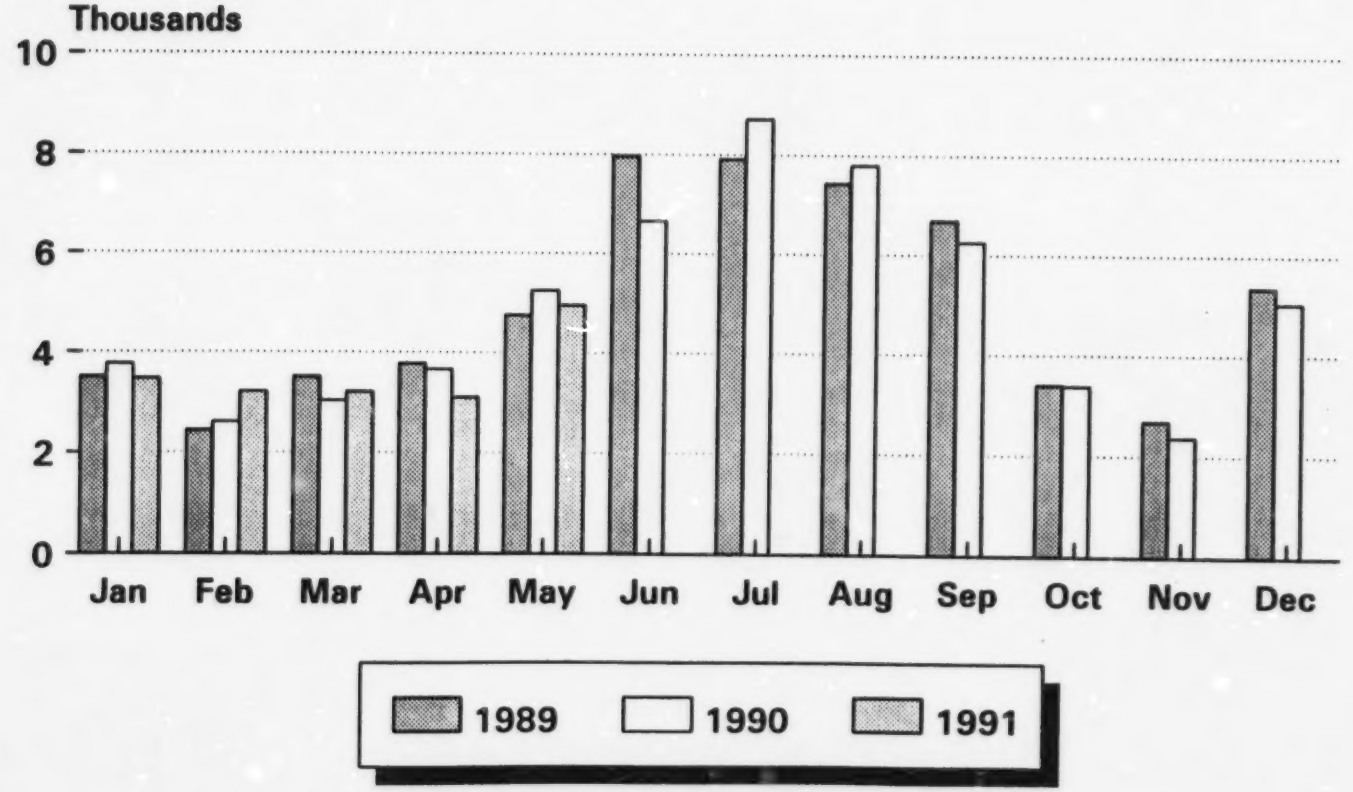
[109]Market Facts, *Pleasure Travel Markets To North America: Italy, Australia, Brazil, Mexico. Highlights Report*, Tourism Canada.

Figure 16
Trip Purpose
Australian Visitors To Canada



source: Statistics Canada, 1989

Figure 17
Australian Visitors to B.C.
Monthly Visitation 1989-91



Source: Statistics Canada, Tourism B.C.

a. The Action Getaway segment accounts for 33% of the Australian market. They seek excitement, adventure, and sporting activities, particularly in an outdoor setting. The wilderness and outdoor recreation products (such as whitewater rafting, hiking, and sightseeing) of Canada have particular appeal to this group.

b. The persons in the Nature and Culture segment (20% of the market) are primarily interested in nature and outdoor activities, and cultural attractions such as museums and historic sites. Many persons in this segment are interested in the exploration of a destination rather than the facilities there. Many are also budget conscious, and will seek their own activities.

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APPENDIX A

DATA TABLES

OVERSEAS ENTRIES TO BRITISH COLUMBIA & CANADA
Based on Statistics Canada 66-001, Tables 3B and 13B; Visitor '89; BC Resident Study

		1989 [1] B.C.	CANADA	BC/Canada	1990 [3] B.C.	CANADA	BC/Canada
JAPAN	Direct Entry	162283	462699	35.1%	189255	474132	39.9%
	Total Visits [2]	177708		38.4%	207244		43.7%
	Visitor Nights	861977			1005241		
	Total Revenue	$88,879,668			$103,651,778		
	% annual increase	21.4%	14.4%		16.6%	2.5%	
	% of BC overseas visits	23.0%			25.5%		
	% of BC overseas nights	13.7%			15.4%		
	% of BC overseas revenue	24.7%			27.3%		
	% of total BC visits	0.8%			0.9%		
	% of total BC revenue	1.8%			2.0%		
	Spending per day	$103.11			$103.11		
	Spending per trip	$500.14			$500.14		
	Length of Stay (nights)	4.9			4.9		
U.K.	Direct entry	107035	614771	17.4%	110117	602401	18.3%
	Total Visits [2]	130341		21.2%	134094		22.3%
	Visitor nights	1278721			1315541		
	Total Revenue	$54,522,822			$56,092,770		
	% annual increase	9.3%	4.9%		2.9%	-2.0%	
	% of BC overseas visits	16.9%			16.5%		
	% of BC overseas nights	20.3%			20.1%		
	% of BC overseas revenue	15.1%			14.8%		
	% of total BC visits	0.6%			0.6%		
	% of total BC revenue	1.1%			1.1%		
	Spending per day	$42.64			$42.64		
	Spending per trip	$418.31			$418.31		
	Length of Stay (nights)	9.8			9.8		
GERMANY	Direct entry	68473	308511	22.2%	66926	290539	23.0%
	Total Visits [2]	79066		25.6%	77280		26.6%
	Visitor nights	826977			808293		
	Total Revenue	$41,825,726			$40,880,764		
	% annual increase	4.9%	-4.1%		-2.3%	-5.8%	
	% of BC overseas visits	10.2%			9.5%		
	% of BC overseas nights	13.1%			12.4%		
	% of BC overseas revenue	11.6%			10.8%		
	% of total BC visits	0.3%			0.3%		
	% of total BC revenue	0.8%			0.8%		
	Spending per day	$50.58			$50.58		
	Spending per trip	$529.00			$529.00		
	Length of Stay (nights)	10.5			10.5		
HONG KONG	Direct entry	71680	123080	58.2%	72749	129609	56.1%
	Total Visits [2]	72682		59.1%	73766		56.9%
	Visitor nights	545349			553482		
	Total Revenue	$35,103,734			$35,627,254		
	% annual increase	45.1%	40.2%		1.5%	5.3%	
	% of BC overseas visits	9.4%			9.1%		
	% of BC overseas nights	8.7%			8.5%		
	% of BC overseas revenue	9.8%			9.4%		
	% of total BC visits	0.3%			0.3%		
	% of total BC revenue	0.7%			0.7%		
	Spending per day	$64.37			$64.37		
	Spending per trip	$482.98			$482.98		
	Length of Stay (nights)	7.5			7.5		

OVERSEAS ENTRIES TO BRITISH COLUMBIA & CANADA
Based on Statistics Canada 66-001, Tables 3B and 13B; Visitor '89; BC Resident Study

		1989 [1] B.C.	CANADA	BC/Canada	1990 [3] B.C.	CANADA	BC/Canada
AUSTRALIA	Direct entry	54498	120316	45.3%	53646	122294	43.9%
	Total Visits [2]	59465		49.4%	58535		47.9%
	Visitor nights	434651			427856		
	Total Revenue	$22,406,639			$22,056,343		
	% annual increase	23.9%	19.3%		-1.6%	1.6%	
	% of BC overseas visits	7.7%			7.2%		
	% of BC overseas nights	6.9%			6.5%		
	% of BC overseas revenue	6.2%			5.8%		
	% of total BC visits	0.3%			0.3%		
	% of total BC revenue	0.4%			0.4%		
	Spending per day	$51.55			$51.55		
	Spending per trip	$376.80			$376.80		
	Length of Stay (nights)	7.3			7.3		
ALL OTHERS	Direct entries	220732	1647461	13.4%	228131	1637416	13.9%
	Total Visits [2]	253238		15.4%	261727		16.0%
	Visitor nights	2352326			2431177		
	Total Revenue	$117,261,411			$121,192,047		
	% annual increase	9.5%	2.6%		3.4%	-0.6%	
	% of BC overseas visits	32.8%			32.2%		
	% of BC overseas nights	37.3%			37.2%		
	% of BC overseas revenue	32.6%			31.9%		
	% of total BC visits	1.1%			1.1%		
	% of total BC revenue	2.3%			2.3%		
	Spending per day	$49.85			$49.85		
	Spending per trip	$463.05			$463.05		
	Length of Stay (nights)	9.3			9.3		
TOTALS							
Overseas	Direct entry	684701	3276838	20.9%	720824	3256391	22.1%
	% annual increase	15.7%	5.5%		5.3%	-0.6%	
	Total Overseas Visits	772500		23.6%	814000		25.0%
	Total Overseas Nights	6300000			6541589		
	Total Overseas Revenue	$360,000,000			$379,500,000		
Provincial	Total Overnight Volume	23245000			23400000		
	Total Revenue	$5,012,700,000			$5,200,000,000		

NOTES:
[1] baseline year for totals; based on Visitor '89 data
[2] "visits" represent direct entries plus indirect entries
[3] calculated by multiplying the 1989 total by the annual increase in direct entries

OVERSEAS ENTRIES TO BRITISH COLUMBIA & CANADA
Based on Statistics Canada 66-001, Tables 3B and 13B

		1985 B.C.	CANADA	BC/Canada	1986 B.C.	CANADA	BC/Canada	1987 B.C.	CANADA	BC/Canada
JAPAN	Direct entry	83287	174503	47.7%	100333	235185	42.7%	104296	311687	33.5%
	Total [2]	88401		50.7%	106493		45.3%	110700		35.5%
	% annual increase				20.5%	34.8%		3.9%	32.5%	
	% of BC entries	22.7%			18.5%			21.1%		
	% of BC nights	21.2%			17.1%			19.7%		
U.K.	Direct entry	58265	345054	16.9%	94751	439319	21.6%	81206	506626	16.0%
	Total [2]	76242		22.1%	123985		28.2%	106261		21.0%
	% annual increase				62.6%	27.3%		-14.3%	15.3%	
	% of BC entries	15.9%			17.4%			16.5%		
	% of BC nights	18.3%			19.9%			18.9%		
GERMANY	Direct entry	36137	181998	19.9%	55802	235936	23.7%	57986	298670	19.4%
	Total [2]	42698		23.5%	65933		27.9%	68513		22.9%
	% annual increase				54.4%	29.6%		3.9%	26.6%	
	% of BC entries	9.9%			10.3%			11.8%		
	% of BC nights	10.2%			10.6%			12.2%		
HONG KONG	Direct entry	25170	43272	58.2%	41446	64545	64.2%	37745	66694	56.6%
	Total [2]	22605		52.2%	37222		57.7%	33898		50.8%
	% annual increase				64.7%	49.2%		-8.9%	3.3%	
	% of BC entries	6.9%			7.6%			7.7%		
	% of BC nights	5.4%			6.0%			6.0%		
AUSTRALIA	Direct entry	34350	76028	45.2%	39879	85021	46.9%	38407	89686	42.8%
	Total [2]	36189		47.6%	42014		49.4%	40463		45.1%
	% annual increase				16.1%	11.8%		-3.7%	5.5%	
	% of BC entries	9.4%			7.3%			7.8%		
	% of BC nights	8.7%			6.8%			7.2%		
ALL OTHERS	Direct entries	129236	987183	13.1%	211055	1199821	17.6%	173523	1369273	12.7%
	Total [2]	150763		15.3%	246211		20.5%	202427		14.8%
	% annual increase				63.3%	21.5%		-17.8%	14.1%	
	% of BC entries	35.3%			38.8%			35.2%		
	% of BC nights	36.2%			39.6%			36.0%		
TOTAL	Direct entry	366445	1808038	20.3%	543266	2259827	24.0%	493163	2642636	18.7%
	Indirect entries	416897		23.1%	621858		27.5%	562263		21.3%
	% annual increase				48.3%	25.0%		-9.2%	16.9%	

Notes:
[1] Tourism B.C. estimate of percentage additional indirect entries via other Canadian provinces
[2] direct entries plus indirect entries ("adjustment")

OVERSEAS ENTRIES TO BRITISH COLUMBIA & CANADA, continued
Based on Statistics Canada 66-001, Tables 3B and 13B

1988 B.C.	CANADA	BC/Canada	1989 B.C.	CANADA	BC/Canada	1990 B.C.	CANADA	BC/Canada
133676	404592	33.0%	162283	462699	35.1%	189255	474132	39.9%
141884		35.1%	172247		37.2%	200875		42.4%
26.2%	29.8%		21.4%	14.4%		16.6%	2.5%	
22.6%			23.7%			26.3%		
21.1%			22.3%			24.7%		
97915	585838	16.7%	107035	614771	17.4%	110117	602401	18.3%
128125		21.9%	140059		22.8%	144092		23.9%
20.6%	15.6%		9.3%	4.9%		2.9%	-2.0%	
16.5%			15.6%			15.3%		
19.0%			18.1%			17.7%		
65304	321704	20.3%	68473	308511	22.2%	66926	290539	23.0%
77160		24.0%	80904		26.2%	79076		27.2%
12.6%	7.7%		4.9%	-4.1%		-2.3%	-5.8%	
11.0%			10.0%			9.3%		
11.5%			10.5%			9.7%		
49403	87785	56.3%	71680	123080	58.2%	72749	129609	56.1%
44368		50.5%	64375		52.3%	65335		50.4%
30.9%	31.6%		45.1%	40.2%		1.5%	5.3%	
8.3%			10.5%			10.1%		
6.6%			8.3%			8.0%		
44002	100841	43.6%	54498	120316	45.3%	53646	122294	43.9%
46358		46.0%	57416		47.7%	56518		46.2%
14.6%	12.4%		23.9%	19.3%		-1.6%	1.6%	
7.4%			8.0%			7.4%		
6.9%			7.4%			7.0%		
201600	1605100	12.6%	220732	1647461	13.4%	228131	1637416	13.9%
235181		14.7%	257500		15.6%	266131		16.3%
16.2%	17.2%		9.5%	2.6%		3.4%	-0.6%	
34.1%			32.2%			31.6%		
34.9%			33.3%			32.8%		
591900	3105860	19.1%	684701	3276838	20.9%	720824	3256391	22.1%
673076		21.7%	772501		23.6%	812028		24.9%
20.0%	17.5%		15.7%	5.5%		5.3%	-0.6%	

JAPAN

Monthly Visitation 1989 - 91

	1989			1990			1991		
	direct entries	% entries	VISITS	direct entries	% entries	VISITS	direct entries	% entries VISITS	% growth
January	7536	4.6%	8254	10743	5.7%	11764	13668	14967	27.2%
February	7465	4.6%	8175	10498	5.5%	11496	11000	12046	4.8%
March	11364	7.0%	12444	13740	7.3%	15046	11578	12679	-15.7%
April	10729	6.6%	11749	12631	6.7%	13832	11520	12615	-8.8%
May	11498	7.1%	12591	13056	6.9%	14297	10589	11596	-18.9%
June	19992	12.3%	21892	21369	11.3%	23400			
July	22392	13.8%	24520	26531	14.0%	29053			
August	28368	17.5%	31064	31955	16.9%	34993			
September	15545	9.6%	17023	18725	9.9%	20505			
October	8827	5.4%	9666	9098	4.8%	9963			
November	7553	4.7%	8271	7425	3.9%	8131			
December	11012	6.8%	12059	13482	7.1%	14764			
TOTAL	162283	100.0%	177708	189253	100.0%	207244	58355	63902	-69.2%

U.K.

Monthly visitation 1989 - 91

	1989			1990			1991		
	direct entries	% entries	VISITS	direct entries	% entries	VISITS	direct entries	% entries VISITS	% growth
January	2896	2.7%	3527	3173	2.9%	3864	3155	3842	-0.6%
February	2737	2.6%	3333	3232	2.9%	3936	4598	5599	42.3%
March	4849	4.5%	5905	4538	4.1%	5526	6588	8022	45.2%
April	5126	4.8%	6242	5561	5.1%	6772	6192	7540	11.3%
May	10424	9.7%	12694	10055	9.1%	12244	13670	16647	36.0%
June	14104	13.2%	17175	14922	13.6%	18171			
July	18385	17.2%	22388	17480	15.9%	21286			
August	19378	18.1%	23597	20357	18.5%	24790			
September	13374	12.5%	16286	14858	13.5%	18093			
October	6748	6.3%	8217	6607	6.0%	8046			
November	3644	3.4%	4437	3560	3.2%	4335			
December	5370	5.0%	6539	5774	5.2%	7031			
TOTAL	107035	100.0%	130341	110117	100.0%	134094	34203	41650	-68.9%

GERMANY

Monthly visitation 1989 - 91

	1989			1990			1991		
	direct entries	% entries	VISITS	direct entries	% entries	VISITS	direct entries	% entries VISITS	% growth
January	2422	3.5%	2797	2142	3.2%	2473	1815	2096	-15.3%
February	1933	2.8%	2232	1742	2.6%	2012	2278	2630	30.8%
March	3266	4.8%	3771	2803	4.2%	3237	2971	3431	6.0%
April	3556	5.2%	4106	3600	5.4%	4157	3771	4354	4.8%
May	6895	10.1%	7962	6141	9.2%	7091	6610	7633	7.6%
June	8204	12.0%	9473	9188	13.7%	10610			
July	12511	18.3%	14446	12483	18.7%	14414			
August	12433	18.2%	14356	13125	19.6%	15156			
September	8190	12.0%	9457	8264	12.3%	9543			
October	4083	6.0%	4715	3622	5.4%	4182			
November	2239	3.3%	2585	1348	2.0%	1557			
December	2741	4.0%	3165	2467	3.7%	2849			
TOTAL	68473	100.0%	79066	66925	100.0%	77280	17445	20144	-73.9%

HONG KONG

Monthly visitation 1989 - 91

	1989			1990			1991		
	direct entries	% entries	VISITS	direct entries	% entries	VISITS	direct entries	% entries VISITS	% growth
January	3058	4.3%	3101	8109	11.1%	8222	2651	2688	-67.3%
February	6720	9.4%	6814	4176	5.7%	4234	7048	7147	68.8%
March	4031	5.6%	4087	3589	4.9%	3639	3815	3868	6.3%
April	3110	4.3%	3153	5342	7.3%	5417	2973	3015	-44.3%
May	4467	6.2%	4529	4868	6.7%	4936	4543	4607	-6.7%
June	5549	7.7%	5627	6931	9.5%	7028			
July	11125	15.5%	11281	11834	16.3%	11999			
August	12933	18.0%	13114	11709	16.1%	11873			
September	6432	9.0%	6522	4856	6.7%	4924			
October	4964	6.9%	5033	3642	5.0%	3693			
November	3859	5.4%	3913	2839	3.9%	2879			
December	5432	7.6%	5508	4854	6.7%	4922			
TOTAL	71680	100.0%	72682	72749	100.0%	73766	21030	21324	-71.1%

AUSTRALIA

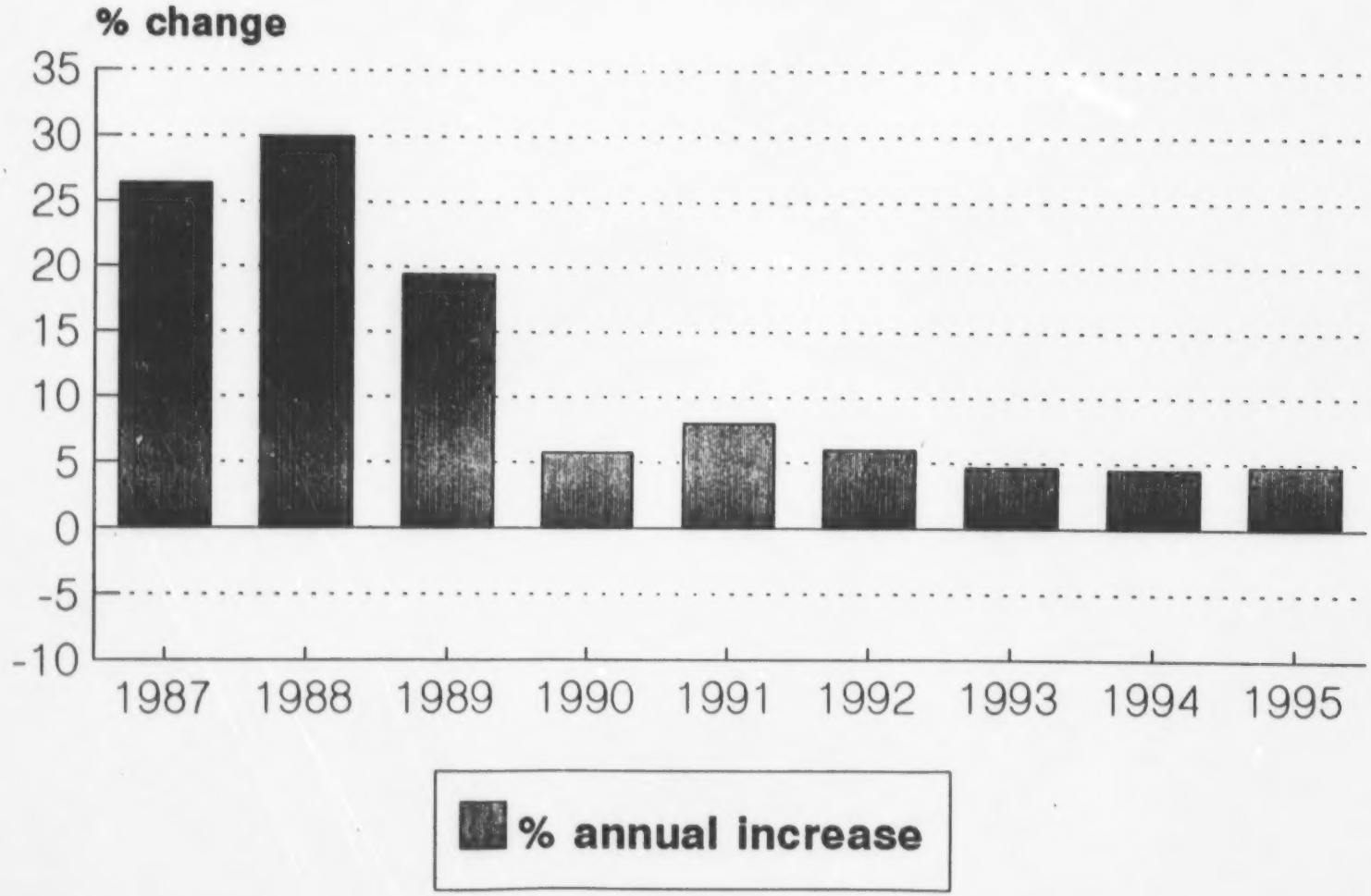
Monthly visitation 1989 - 91

	1989			1990			1991		
	direct entries	% entries	VISITS	direct entries	% entries	VISITS	direct entries	% entries VISITS	% growth
January	3218	5.9%	3511	3452	6.4%	3767	3182	3472	-7.8%
February	2236	4.1%	2440	2382	4.4%	2599	2938	3206	23.3%
March	3218	5.9%	3511	2773	5.2%	3026	2937	3205	5.9%
April	3463	6.4%	3779	3355	6.3%	3661	2833	3091	-15.6%
May	4356	8.0%	4753	4812	9.0%	5251	4545	4959	-5.5%
June	7312	13.4%	7978	6105	11.4%	6661			
July	7259	13.3%	7921	7988	14.9%	8716			
August	6809	12.5%	7430	7147	13.3%	7798			
September	6132	11.3%	6691	5741	10.7%	6264			
October	3119	5.7%	3403	3091	5.8%	3373			
November	2460	4.5%	2684	2173	4.1%	2371			
December	4916	9.0%	5364	4627	8.6%	5049			
TOTAL	54498	100.0%	59465	53646	100.0%	58535	16435	17933	

APPENDIX B

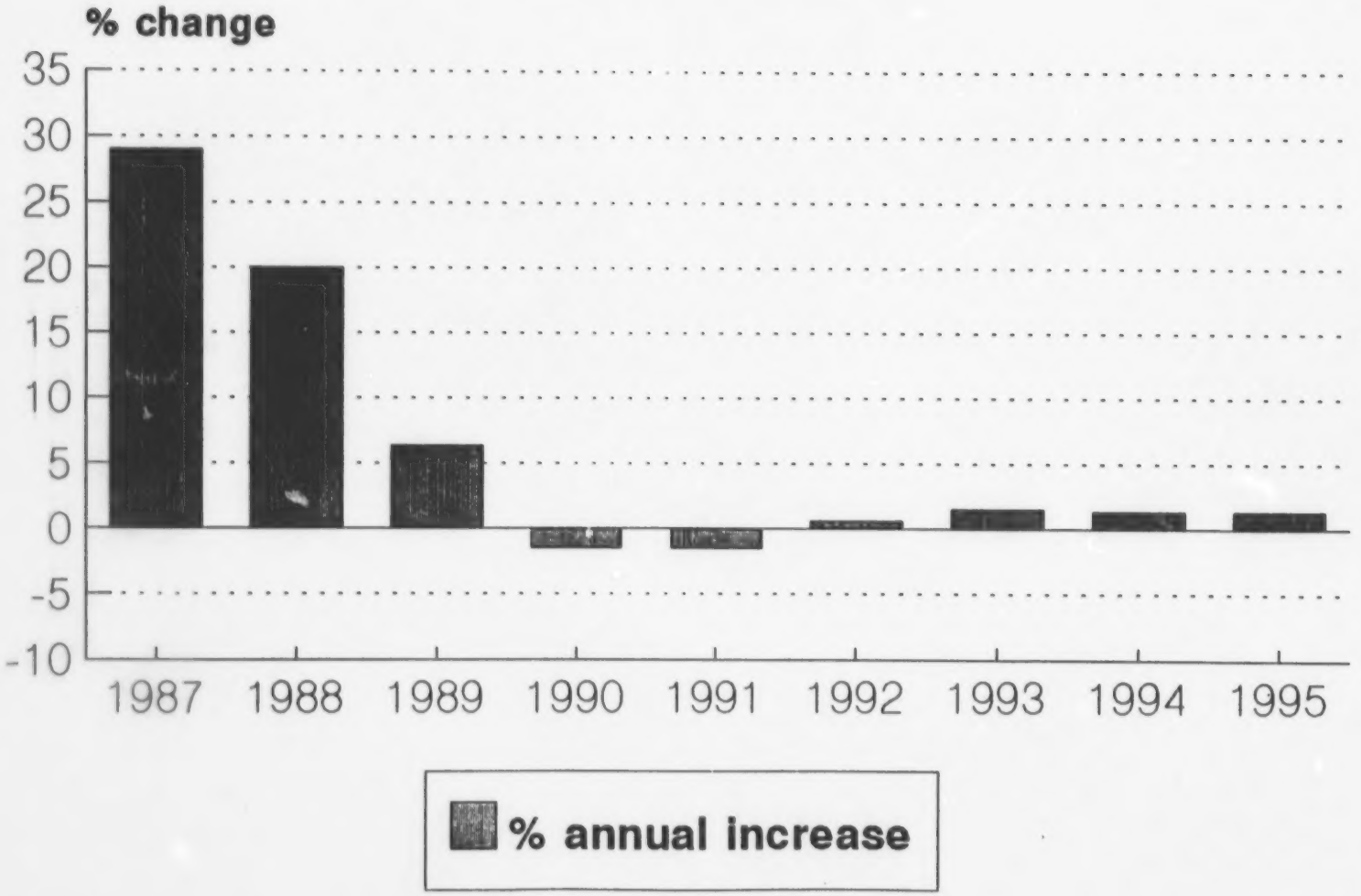
GROWTH FORECAST CHARTS

OVERNIGHT TRIPS
From Japan to Canada
1987-1995



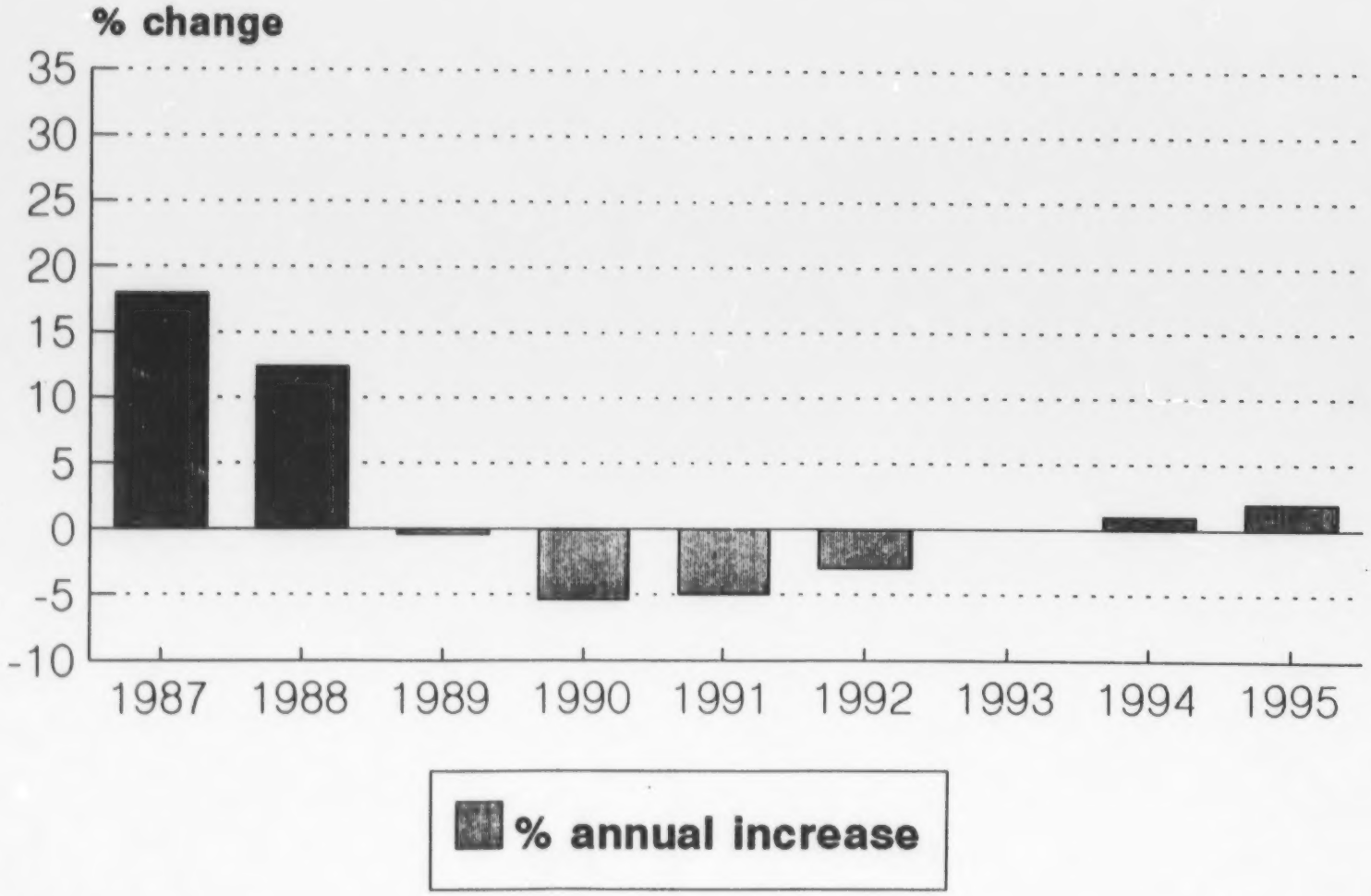
source: Tourism Canada

OVERNIGHT TRIPS
From UK to Canada
1987-1995



source: Tourism Canada

OVERNIGHT TRIPS
From Germany to Canada
1987-1995



source: Tourism Canada